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RAPID

RAPID Task Order 3.3

STATUS OF NATURAL RESOURCES BASED COMMUNITY TOURISM (NRBCT) INITIATIVES IN SOUTHERN AFRICA AND RECOMMENDATIONS ON SUSTAINABILITY

Draft Comprehensive Report

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3. Status of NRBCT in SADC Member Countries

3.1 Introduction

The level and sophistication of development that the NRBCT sub-sector in SADC has risen to varies enormously from country to country and from operation to operation. In general, the same can also be said for the tourism industries of each country as a whole.

The extent of NRBCT development varies from none at all through to quite an extensive tourism sub-sector with a variety of different NRBCT operations. The level to which NRBCT has developed, however, does not appear to be linked to the extent to which the conventional or mainstream tourism industry may have developed within each country. In some countries with very well-developed tourism industries, such as Mauritius and Seychelles, NRBCT hardly features at all. At the other extreme, however, countries with no or very little tourism industry to speak of, such as Angola and Mozambique and Malawi to some extent, the level of NRBCT is also quite minimal.

It seems, therefore, that in order for NRBCT to develop at all in any particular country, at least some level of mainstream tourism development in the country and an established, although not necessarily large, tourism market is required. With regards the extent to which NRBCT develops in each country, however, other factors come into play. These factors are many and varied and will become more apparent deeper into this document. In general, though, they appear to be related to *inter alia* the type, extent and quality of the natural resource base that is being exploited (eg. wildlife, cultural heritage, unique features), available infrastructure (eg. roads, communications, transport linkages), government policy on and commitment to CBNRM in general (eg. community tourism policy, state community institutions), level of awareness and interest in tourism by communities and entrepreneurs (ie. what exposure have they had to tourism and how innovative and/or progressive are community leaders and entrepreneurs), level of appropriate skills (eg. business, negotiations and marketing), interest shown by the private tourism sector (ie. interest in obtaining user rights for community-owned resources and/or establishing partnerships with communities and the level of risk the private sector must take), support given by donor agencies and non-government organisations (NGOs), availability of funding, etc, etc.

With differing levels of development of conventional tourism industries and a diverse mix of the many other factors that influence the development of NRBCT, it is not surprising, therefore, that the NRBCT sub-sector in each of the SADC countries differs quite considerably.

This section attempts to provide a 'snapshot' status of NRBCT in each of the SADC member countries. In doing this, each 'country report', which is split into five main parts, provides information on the following:

1) brief outline and overview of the current status of the tourism industry in each of the SADC member countries, describing the main forms of tourism and principal tourism bodies in the country and providing, where possible, an indication of the latest available tourist statistics and trends;
2) an indication of the main characteristics and principal forms of NRBCT in each country and the level to which it has developed;
3) a brief summary of the types and names of NRBCT operations and initiatives that exist (with fuller descriptions of each operation being given in the separate *Directory of NRBCT Operations in the SADC Region*);
4) an idea of the principal strengths and weaknesses of NRBCT in each country. Many strengths and weaknesses are common to more than one country, so only those of special note to each country are given; and

5) a summary of the principal marketing issues of relevance to NRBCT that were identified in each country. These issues may not necessarily be negative ones, as there are certainly some marketing issues that are positive.

Each of the SADC member countries is taken separately and in alphabetical order – this being the usual convention throughout this report. Unavoidably, the treatment for some countries is limited, especially where field visits were not made: for others, the range, type and depth of information that has been obtained may differ quite considerably. Consequently, the individual accounts for each country do differ in the amount of detail provided.

As stated in **SECTION 1.6**, all reasonable attempts have been made to give as comprehensive coverage and treatment as possible of NRBCT in SADC countries. It was not possible to meet with all the key stakeholders in NRBCT, nor visit as many NRBCT operations and products as would have been desired. In addition, some of the material requested from information sources simply did not materialise. As such, coverage of each country is not as comprehensive as the authors would like it to have been. Consequently, it could be argued that the individual country assessments are not as valid as they could be. The study team accepts this and apologises for it.

Furthermore, it is recognised that NRBCT as a tourism sub-sector, as with CBNRM in general and many other fields that are allied to community development and tourism, is characterised by a diverse range of organisations, interest groups and individuals who have different ideas, interpretations, perceptions, loyalties, visions, aims, objectives and agendas – a healthy situation that stimulates discussion and progress. It is therefore unlikely that the assessments given here will be agreeable to all those who may read them. However, being the joint deliberations and common opinion of the team involved in this study, which are no less valid or relevant than those opinions of anyone else, no apology is given in this regard.

3.2 Angola

It was not possible to undertake a field visit to Angola during this study. Instead, requests for information were made direct to the Ministry of Hotels and Tourism. Unfortunately, however, no information was forthcoming. The very limited treatment of Angola here relates primarily to the statistical information obtained, via the Internet, from the World Tourism Organization's (WTO) database on tourism statistics.

3.2.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

Angola has been suffering a civil war for more than 25 years. This war has devastated large areas of the country and created a security situation that is far from conducive to any forms of tourism. What tourism that might take place in the country is most likely linked almost entirely to the capital Luanda, with much of that tourism relating to business and politics rather than holidaymaking and leisure.

The WTO statistics on tourism show that Angola received a total of 45,477 visitors during 1999. This was down 12.6% on 1998, but virtually the same on 1997 figures. A breakdown of the country of origin of international arrivals is given below.

Arrivals in Angola by region for the year 1999

Region of Origin	No. of Visitors	% of Total
AFRICA	No overall figure available	n/a
South Africa	3,795	8.3
Nigeria	136	0.3
Guinea Bissau	125	0.3
DRC	92	0.2
Zambia	62	0.1
Namibia	61	0.1

Other (quantified) Africa	186	0.4
EUROPE	No overall figure available	n/a
Portugal	15,528	34.2
France	3,543	7.8
UK	2,857	6.3
Other (quantified) Europe	3,873	8.5
AMERICAS	No overall figure available	n/a
USA	2,902	6.4
Canada	442	1.0
Brazil	2,192	4.8
ASIA	No overall figure available	n/a
CIS	1,365	3.0
Philippines	863	1.9
China	268	0.6
India	253	0.6
AUSTRALASIA & PACIFIC	No overall figure available	n/a
Australia	384	0.8
OTHER	6,550	14.4
TOTALS	***45,477***	***100.0***

Source: World Tourism Organisation (October 2000)

Regrettably, the way the statistics are presented for Angola (and some other countries relevant to this study) in the available WTO figures does not allow for any detailed analysis of markets.[*]

As can be seen, at least a third of visitors to Angola originate from Portugal and probably visit Angola as VFRs or on business. It is likely the bulk of visitors from other countries, notably South Africa, France, USA, Canada and the UK, are in Angola on business, probably related to commerce, the oil industry and mining.

3.2.2 KEY CHARACTERISTICS OF NRBCT

It was impossible to deduce from the tourism statistics whether or not Angola has any NRBCT. It seems likely, however, that the current civil war in Angola, which directly affects most of the rural areas in the country, has curtailed any NRBCT tourism operations or initiatives that may have been in place or in the pipeline. Realistically, there seems very little chance of developing any NRBCT, or any meaningful tourism industry for that matter, in Angola until the current conflict comes to an end and some confidence within the tourism industry is re-established in the country.

3.3 Botswana

3.3.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

The major tourist attractions in Botswana are the 13,000 km^2 Okavango Delta, the largest inland wetland habitat of its kind in the world, and the Chobe National Park. Most of the Delta is protected in the Moremi Game Reserve and the Wildlife Management Areas (WMAs) surrounding the reserve. Wildlife and wilderness are Botswana’s outstanding tourism assets and its wildlife is regarded as one of the best in the region, in terms of species diversity and abundance. Other attractions, that are either less well developed or not developed at all, include the Central Kalahari Game Reserve, the Kgalagadi

[*] In fact, there are some serious problems with regards how tourism data and statistics for Africa are gathered, grouped and presented. For example, WTO defines Southern Africa as consisting of South Africa, Lesotho, Swaziland, Botswana and Namibia, whilst Eastern Africa consists of Mozambique, Zimbabwe, Zambia, Malawi, Madagascar, Mauritius, Tanzania, Rwanda, Burundi, Kenya, Uganda, Somalia, Ethiopia, Eritrea and Djibouti. These bear no relation to the SADC grouping of southern African countries, or what is widely and popularly known and accepted as southern Africa and East Africa. Therefore, other than data for the individual countries, the relevance of the WTO groupings to SADC is somewhat questionable and makes for confusing interpretation.

Transfrontier Park (which straddles the frontier with South Africa) and the diverse culture of its people and sites of cultural and archaeological significance.

Wildlife/nature-based tourism in Botswana is made up of two main types: consumptive tourism, in the form of a well-developed and internationally renowned trophy hunting industry largely conducted within the WMAs; and non-consumptive tourism, in the form of game-viewing and photographic safaris undertaken in the country's protected areas. In comparison, cultural tourism is generally very much unexploited and underdeveloped.

The tourism sector in Botswana represents the third most important earner of foreign exchange, after mining and cattle, contributing slightly more than 3% to the GNP. Although third, therefore, tourism is still a relatively minor sector compared with mining and cattle. The tourism sector does, however, offer employment and business opportunities for people and communities who may not be involved in mining or cattle or other economic sectors.

The latest tourism figures available to this study for Botswana are for 1998 (Botswana Department of Tourism Website, www.gov.bw/tourism). In that year and according to these figures, a total of 749,544 people visited Botswana, representing a 23.5% increase on 1997. The 1998 figure is broken down as follows:

Arrivals in Botswana by region for the year 1998

Region of Origin	No. of Visitors	% of Total
Africa	629,042	83.9
Europe	38,755	5.2
Americas	10,714	1.4
Asia & Pacific	10,190	1.4
Unknown	60,843	8.1
TOTALS	***749,544***	***100.0***

Source: Botswana Department of Tourism Website (as of October 2001)

The great majority (83.9%) originated from Africa, with most of these likely to be self-drive visitors from neighbouring South Africa. The next biggest market for foreign arrivals is Europe with 5.5% of the total. The Americas, Asia and the Pacific region contribute less than 2.8% of total foreign arrivals. It is not known exactly what is meant by 'unknown' visitors. With this category representing more than 8% of the world market, it does seem to be an important market segment.

The table below gives a breakdown of purpose of visit for international arrivals.

Purpose of visit to Botswana for the year 1998

Purpose of Visit	No. of Persons	% of Total
VRFs	302,563	40.4
In transit	176,787	23.6
Holiday and leisure	169,544	22.6
Business	79,330	10.6
Other	21,320	2.8
TOTALS	***749,544***	***100.0***

Over 40% of international arrivals are visiting friends and relatives in Botswana. The next largest category of foreign visitors consist of people passing through Botswana on their way to and from South Africa, Zimbabwe, Namibia and Zambia. Holiday and leisure makers constitute 22.6% of international arrivals, up 11.4% on 1997 figures, with 90% travelling to Botswana primarily for the wildlife and wilderness experience on offer. In 1998, the country's protected areas received 159,621 visitors. This is a fairly significant rise of 57.8% over figures for 1995.

The tourist industry is highly seasonal. In 1998, April and July together had the largest number of monthly arrivals and 23% of the year's total. February, November and June were the least popular months.

In presenting these figures, it must be queried as to why the national website for tourism in Botswana features tourism statistics that are now almost three years out of date. Surely, there must be more recent data readily available (the most recent WTO figures are also for 1998) and, if so, why haven't they been incorporated into the country's lead tourism website? The website itself is quite comprehensive and well constructed, although it does ages to download. The inclusion of out-of-date statistics, though, does nothing to enhance the site. Furthermore, some of the figures given in the text and in the various graphs do not add up or correspond with others. With the website presumably acting as an important shop window for tourism in Botswana, there is no excuse for the dated information and mistakes.

Botswana has a good and improving road network and international airports in Gaborone and Maun. Smaller airstrips are found in other parts of the country, most notably in Kasane, which is the nearest town to the Chobe National Park. Access to most tourist areas, therefore, is relatively easy, although distances travelled can be great and the cost of domestic air travel is expensive. Another plus factor for tourism is that Botswana has an excellent reputation for good security, with tourist operators in the country considering crime to be well under control.

The Botswana Tourism Master Plan (BTMP), which was formulated by the Department of Tourism in the Ministry of Commerce and Industry in conjunction with an EU-funded project, made an assessment of the tourism industry in Botswana. It made several observations that are extremely relevant to NRBCT in Botswana. These include:

- that tourists find guides in Botswana are below the expected standard;
- that tourists to Botswana spend 4% of their total expenditure on handicrafts;
- that, at peak periods, some protected areas, most notably Chobe National Park, reach their estimated carrying capacities for tourists;
- that the BTMP recognises that there are opportunities for rural communities to become involved in tourism;
- that sites of archaeological and historical significance can be used to add value and lengthen the duration of stay to existing "mainstream" wildlife/nature vacations, with some sites and features having the potential to become the basis for special interest tours;
- that there is an opportunity for increasing domestic tourism; and
- that there is a need for product diversification, ie. adding new components to the existing tourism product, such as other geographic areas and specialist packages.

There are therefore opportunities for community participation in tourism through:

- direct employment in the industry;
- the sale of handicrafts to the tourist, especially if the crafts can be diversified;
- the development of well-run facilities, such as campsites and chalets, in selected areas adjacent to national parks and game reserves;
- the development of well-trained guides; and
- the development of special interest packages.

A national tourism plan for Botswana is therefore now in place and an eco-tourism strategy is currently being developed. According to the BTMP, NRBCT in Botswana has a positive policy context in which to develop and attract increasing numbers of visitors.

There are three key government and private sector institutions involved in tourism in Botswana. These are:

- Ministry of Commerce and Industry with its two sister departments, the Department of Tourism and the Department of Wildlife and National Parks (DWNP);
- Hotel and Tourism Association of Botswana (HATAB), a private sector association that works particularly closely with the safari industry in Ngamiland and Chobe and other key stakeholders in the development of community/private sector ventures; and
- Botswana Community Based Organisation Network (BOCOBONET), an organisation that organises training and capacity building for CBOs, as well as advocating for their interests.

The Department of Tourism is responsible for developing policy relating to tourism in Botswana, registration, regulation and marketing. The department has officers based in selected districts with broad responsibility for tourism in their areas, but with very few personnel available for carrying out NRBCT development programmes. There is no 'national tourist board' in Botswana, with the normal duties of such a board, such as marketing, licensing, standards, monitoring, etc, being handled by the Department of Tourism.

DWNP is responsible for wildlife conservation in Botswana, both within the countries protected areas and within the many WMAs. DWNP has a network of officers in the districts throughout Botswana. Many of these officers work in the Community Services Division and provide extension services to communities who want to become involved in and monitors off-take of animals through hunting and game sales.

Botswana is one of only four countries in SADC (the others being Namibia, Zimbabwe and Tanzania) that has a national community institution (BOCOBONET) that is largely representative of community tourism in Botswana.

3.3.2 Key Characteristics of NRBCT

Community-based tourism in Botswana developed principally, but not exclusively, under the CBNRM programme in the DWNP, with the support of various NGO partners and a variety of donor agencies, including USAID, SNV and, more recently, GTZ and DFID.

CBNRM focused on community participation in the conservation of natural resources and grew out of, firstly, fears about the impact that poaching was having on wildlife populations and, secondly, changes in national policy towards greater decentralisation of decision-making, previously the sole preserve of national government. Not surprisingly, therefore, CBNRM developed within DWNP and focused largely on wildlife.

Perhaps the CBNRM programme's greatest successes were in the area of developing mechanisms for communities to gain access to lucrative concessions for consumptive wildlife-based tourism. Indeed, Botswana has made the greatest strides in facilitating the access of communities to resources (wildlife and land) that form the basis of the tourism industry in the country's key tourist destinations. Qualifying communities, ie. those that have legally-registered and representative community-based organisations (CBOs), are allocated annual wildlife quotas by DWNP and granted 15-year leases by the relevant land authority (mostly land boards) to land-use units known as Controlled Hunting Areas, or CHAs. The usual type of community institution is a Trust

To-date, eight communities have now entered into formal agreements with the private sector, which develops and runs trophy hunting and photographic safaris inside community CHAs. CBOs earn annual fees that range from BWP 500,000 (about US$ 87,000[*]), to BWP 1 million (about US$ 174,000).

[*] Approximate exchange rate of BWP 5.75 per US dollar

Through wildlife concessions, therefore, a number of communities have become important stakeholders in the tourism industry, especially in the Ngamiland and Chobe areas in northern Botswana.

DWNP and the Ministry of Agriculture completed the development of a CBNRM policy in 2000, but it has not been formally adopted by Government. In early 2001, a written communication from the Ministry of Local Government to district officials directed them to hold payments for the wildlife quota going to the communities from the concessionaires. The directive appears not to have been implemented and the confusion it caused on the CBNRM/NRBCT process has yet to be formally cleared up. The lack of clear policy for CBNRM/NRBCT within government may have been the cause for the confusing policy directive.

NRBCT in Botswana is heavily skewed towards wildlife, either trophy hunting or game viewing. Although the dominant resource base for NRBCT in Botswana is wildlife, however, a few communities do have other resources to draw upon. Some communities produce crafts, including the famous Botswana baskets. Communities around the Kalahari produce a range of distinctive ostrich shell and leather jewellery and, with some assistance from SNV, have also developed cultural tourism packages to explore the desert using Basarwa/San traditional hunters as guides. Rural residents in CBOs, such as the Kuru Development Trust, Thamaga village pottery and the Oodi village weavers have developed arts and craft centres[*]

There are presently five main types of NRBCT in Botswana.

Trophy hunting. The largest and presently most important set of NRBCT enterprises in Botswana are those that are based on the annual wildlife quotas that are set by the DWNP. With only one exception, namely Xai Xai which lies within the Central Kalahari Game Reserve, all these community enterprises are located on the boundary of a national park or game reserve. Eight enterprises are located in the Okavango Delta outside of Moremi Game Reserve, one is on the banks of the Chobe River and one is situated on the boundary of the Kalahari Transfrontier Park.

Campsites. Several communities have developed campsites, but these are of varying standards. Some campsites offer guide services.

Craft markets. A number of communities are involved in craft making and craft markets. The craft markets operate in several different ways. Crafts can either be sold to a wholesaler, who in turn sells them in the major centres of Maun, Gaborone or outside of Botswana, or the crafts are sold by individuals at road side stalls, or the crafts are sold through an outlet or shop within the community itself.

Cultural tourism. Some CBOs have organised tourist activities or a cultural nature. One CBO, for example, has activities based on indigenous knowledge of the land and its resources and offers bush walks and bow-and-arrow hunting. Several CBOs have dance troupes and one CBO holds an annual dance festival. Several CBOs are custodians or internationally important archaeological sites and community guides take visitors to these sites.

Photographic tourism. *Mokoro* polers are the most visible and important example of individual community-based entrepreneurs at work in tourism. Other community residents are involved as employees of private sector commercial tourist operators. Although most employees are unskilled or have relatively unskilled jobs, such as housekeeping, there are an increasing number of guides who have been trained through the Botswana Wildlife Training Institute (BWTI) or through in-service training provided by their employers.

[*] Thamaga and Oodi are not included in the *NRBCT Directory* as the crafts they produce are not based on locally obtained biological resources.

An analysis of the type of NRBCT products and activities has identified 17 different products and activities. These are summarised in the table below.

Product or Activity	Number Available
Birdwatching	2
Campsites	10
Chalets	1
Craft shops, roadside sellers, craft centres	9
Cultural performance (dance, singing, story-telling)	4
Environmental education	1
Exploring caves	1
Guest houses	2
Guided tour gathering veld products	1
Guided traditional bow-and-arrow hunting	1
Horseback riding	1
Mokoro (canoe) polers for game viewing	3
Nature walks	1
Night drives	1
Restaurant	1
Traditional village	1
Trophy hunting/photographic safari concessions	10
TOTAL	***50***

Tourism in the Okavango Delta relies largely on 4-wheel drive vehicles or small planes flying tourists into inaccessible areas in the Delta. This means that, for most of the communities found in the area, unless they are located near to the principal tourist hubs of Maun and Kasane, the level of drive-by traffic is low and sporadic. This is an excellent illustration of where many NRBCT operations must rely upon tourists brought into an area by commercial private sector operators and the importance of being able to catch passing tourists.

The craft shops listed in the *NRBCT Directory* are either near to one of the principal towns (eg. Shorobe near Maun and the Kuru Development Trust near Ghanzi), or are close to a main entry point into a national protected area (eg. Kwhai near Moremi Game Reserve).

3.3.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

In total, there are ***20 NRBCT products*** in Botswana. These are made up of:

- 9 x trophy hunting agreements between communities and commercial operators;
- 6 x campsites of varying standard;
- 2 x craft centres with a very high standard of craft products;
- 1 x church-assisted community craft centre/guest house/annual dance festival.
- 1 x *mokoro* safaris cooperative;
- 1 x products with strong environmental management and educational objectives;

#	Name of Operation	Type of Products	Beneficiary Community
1	Khama Rhino Sanctuary Trust	Chalets, campsite; game viewing, night drives, nature walks, bird watching; environmental education	Serowe community
2	Tati Wood Carvers	Wood carvings	Individual carvers
3	Chobe Enclave Community Trust (CECT)	Trophy hunting concession; craft shop (not run by CECT)	Five villages (~4,000 people)
4	Dqãe Qare Game Farm	Campsite, guest house	D'kar village
5	Kuru Development	Craft centre (jewellery,	D'kar village

#	Name of Operation	Type of Products	Beneficiary Community
	Trust (KDT)	textiles, paintings, prints, saddles, leather goods); campsite, guest house; game far; guided bush walks; annual San Dance Festival (August)	
6	Nqwaa Khobee Xeya Trust (NQXT)	Trophy hunting concession; 3 x campsites; ostrich & leather crafts	Nqwaa Khobee Xeya community
7	Kalepa	Trophy hunting concession	Kalepa community
8	Bokamoso Women's Cooperative	Baskets, wood carvings, leather goods	Individual craft persons
9	Mababe Zukutsham Community Development Trust	Trophy hunting concession; basketry	Mababe village (~100 people)
10	Okavango Polers Trust	*Mokoro* polers; game viewing safaris	Individual polers
11	Okavango Community Trust	Trophy hunting concession (2 operators with tented camps); *mokoro* polers; game viewing	Five villages (~3,500 people)
12	Okavango Kopano Mokoro Community Trust (NG 32)	Trophy hunting concession; *mokoro* polers; game viewing	Six villages (~2,000 people)
13	Ngwaoboswa		
14	Cgae-Cgae Tlhabololo Trust (CTT)	Trophy hunting concession; package tours which include bow hunting, gathering veld foods, traditional dancing, singing, story telling, visits to caves & horse trails	/Xai-/Xai village (~400 people)
15	Khwai Development Trust	Trophy hunting concession; basket shop	Khwai village (~350)
16	Sankuyu Tshwaragano Management Trust	Trophy hunting concession; photographic safari concession; campsite; traditional village	Sankuyo village (~400 people)
17	Mmatshumo Community Trust	Campsite; guides	Kubu Island community
18	Nata Sanctuary	Campsite; bird watching	Nata community
19	Lepokole Hills Conservation Project		
20	Moremi Manonye Conservation Trust	Campsite	Moremi Gorge community

A total of ***11 NRBCT initiatives*** are known. These all consist of communities presently in the process of registering or acquiring head-leases to land, setting up their organisations and defining the projects. A few of these initiatives are quite advanced in their development and intend to be operational in 2002.

3.3.4 STRENGTHS AND WEAKNESSES OF NRBCT

Strengths in NRBCT include the following:

- rural communities are stakeholders in all areas of Botswana where there is tourism, including the most lucrative areas in Ngamiland;
- use of an existing landuse unit (CHA) for delineating communities reduces the legal, financial and social costs of trying to identify and delineate "traditional" areas;
- established process for community to access land for tourism developments;
- clear process for tenders and evaluation of joint venture agreements;

- strong community-private sector links in the concessions;
- strong support from NGOs and DWNP for initial development of Trusts;
- wide variety of organisations working with communities to develop community tourism (eg. national and district government agencies, international donors, NGOs, churches, private individuals and associations);
- district government support for marketing wildlife resources to tourist operators;
- capacity for participation in tourism is slowly being built up;
- well-focussed national NGO, BOCOBONET, which advocates for and monitors CBO institutional development;
- generation of significant sums of money for communities through the joint ventures for trophy hunting;
- tourism benefits to the community are in the form of control of the annual wildlife quota, profits from wildlife quota sales and land rental, employment, training, etc;
- growth of CBNRM District Forum in Ngamiland provides the private sector, district government and CBOs an arena in which to sort out issues before they get out of control.

Weaknesses in NRBCT include the following:

- high dependence on wildlife concessions without development of other tourist related activities that can draw more community residents into the tourism sector;
- low level of entrepreneurship being developed by individual residents from communities;
- poor management mechanism for reinvesting tourist-generated revenue at community level;
- high turnover in joint venture partners with little sign of communities seeing the need to develop long-term business relations with partners;
- lack of professional technical support to draw up joint venture agreements;
- no clear career path for entry-level community employees in the joint venture agreements;
- little consistent monitoring of joint venture agreement, particularly of the training and capacity-building component;
- failure to select a community project, be it tourism-related or something else, early in the process of CBNRM may delay the growth of confidence in the Trusts and may cause a slow down in the growth of CBNRM;
- CBOs do not have articulate investment strategies;
- no focus on site-evaluation of the CBO area as a starting point for diversification of tourism infrastructure and products;
- CBOs have little understanding within the community of enterprise management, no training plans and no intermediate plan for acquiring management skills from outside the community;
- lack of technical support for location, design, construction and management of community products, such as campsites and cultural villages;
- CBO profits trickle very slowly through the community, with some being hardly spent;
- most communities have no promotional material at all with lack of signage being a particular problem;
- sectoral divisions between wildlife and tourism may be reducing the support structure that NRBCT needs to thrive;
- lack of a clear understanding between some district tourism and DWNP offices of their coordinated support/extension roles with the communities they both worth with and serve.
- Conflicting messages from different government offices over the future of CBOs (viz. recent directive from Ministry of Local Government);
- lack of an NGO that focuses solely on NRBCT development and marketing;
- BOCOBONET, the national NGO for CBOs, though in good working contact with HATAB, needs tourism awareness training in order to assist in community tourism efforts;
- lack of consultants or other forms of impartial advice to provide technical services and advice to communities.

The particular strengths that stand out for communities involved in NRBCT in Botswana are that they:

- are able to generate revenue;
- are gaining capacity to develop community-wide organisations;
- have a national organisation, BOCOBONET, that provides some training and advocates for community interests; and
- have one well-run CBO which acts as an example for others in Botswana and probably in the region as a whole.

However, the despite the revenue that is generated, communities:
- lack experienced entrepreneurs who can help re-invest funds generated from wildlife sales;
- lack skills to allow individuals to take advantage of better-paying jobs in the tourism industry; and
- lack an organisation with a specific focus on NRBCT development and marketing.

In general, the weak point for Botswana's CBOs is poor management. Until the CBOs resolve the management issue, they will find it difficult to develop and implement a reinvestment strategy for their wildlife revenues. It is the most pressing problem that was mentioned by interviewees during this study.

The example that stands out against this pattern is the Khama Rhino Sanctuary, which is also a CBO. Tribal land was set aside by a local community (Serowe) for the purposes of wildlife conservation. Like other CBOs, the Sanctuary has a board of community residents, drawn from a generally highly skilled population. Unlike the other CBOs, however, the Sanctuary is run by a salaried professional manager. This manager happens to come from the local community, but could have equally been sourced from elsewhere in the country. A talented board and professional management, therefore, have led to arguably the best run community wildlife operation (with campsites and chalets) in Botswana – if not the region as a whole.

3.3.5 PRINCIPAL NRBCT MARKETING ISSUES NOTED

Marketing for trophy hunting is done by the respective commercial safari hunting operators. Most of the joint venture communities, however, have other smaller non-consumptive tourism activities to attract visitors. Some of these activities, such as *mokoro* poling in the Okavango Delta, are well linked to major tour operators, with the marketing being done by those operators. Some activities, such as basket shops, are poorly linked and rely almost entirely on passing trade. Some of the campsites are of too poor a quality for any international marketing and the remoteness of some of the campsites may be too strong a negative to overcome, regardless of any marketing efforts.

In general, all communities need input from the tourism agencies and the private sector to evaluate their tourism potential and to select, develop and promote their products. The new eco-tourism office in the Department of Tourism should go a long way to changing the present situation.

3.4 Democratic Republic of Congo

In keeping with current USAID policy, DRC did not form a part of this study. However, it is known that communities are involved in several tourism operations that take advantage of the unique attraction of the lowland and mountain gorillas found in the Ruwenzori mountains in the east of the country. In recent years, these operations have been maintained at a low level through input from the World Conservation Society (WCS), WWF, IUCN and the Diane Fossey Gorilla Foundation. Tourists visiting these operations usually enter the country from Uganda.

3.5 Lesotho

3.5.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

The tourism industry in Lesotho is based mainly on the spectacular scenery the country has to offer, the technological attractions of the large-scale Lesotho Highlands Water Project and the culture and traditions of the Basotho and the earlier Khoisan peoples. These resources are exploited primarily through pony trekking and walking trails, tours to various sites on the Highlands Water Scheme and products and activities relating to culture and history, especially crafts. There is no wildlife-based tourism as such in Lesotho, although some of the national parks (eg. Sehlabathebe and Ts'ehlanyane) have been set up specifically to conserve certain rare and/or endangered animals, plants or vegetation types.

The last available figures for tourism in Lesotho are for December 2000. These show that Lesotho received a total of 257,932 international arrivals in 2000. These are broken down in regions of origin as follows as follows:

Arrivals in Lesotho by region for the year 2000

Country/Region of Origin	No. of Visitors	% of Total
South Africa	224,486	87.0
Rest of Africa	14,810	5.7
Europe	10,252	4.0
Americas	2,326	0.9
Asia	4,896	1.9
Other	1,162	0.5
TOTALS	***257,932***	***100.0***

Source: Lesotho Ministry of Tourism

The purpose of visit to Lesotho is broken down as follows:

Purpose of visit to Lesotho for the year 2000

Purpose of Visit	% of Total Visitors
Business	14.9
Holiday	28.3
VFRs	56.8
TOTALS	***100.0***

Source: Lesotho Ministry of Tourism

By far the greatest number of international arrivals originate from South Africa. The great majority of these are likely to be migrant workers living and working in the urban centres in South Africa and on agricultural land in adjacent areas of South Africa. This seems to be borne out by the high percentage (almost 57 %) of VFRs (visiting friends and relatives) arriving in Lesotho, representing more than 146,000 people.

Of the total number of visitors 250,975 (97.3 %) arrived in Lesotho by road, while only 6,957 (2.7 %) arrived by air, most probably through Moshoeshoe I International Airport south of Maseru. The average length of stay of visitors was 5.7 days.

In general, the tourism industry in Lesotho is in a fairly poor state at the moment. This is due mainly to a historically low utilisation of the country by *bona fide* tourists, the political upheavals that have taken place in the country in recent years, the lack of coordination and full responsibility for tourism and tourism development between the various government ministries and the generally low level of development of tourist facilities in the country as a whole.

In 1994, an EU-funded study produced a ten-year tourism development plan for Lesotho. This was followed in 1997 by a training and institutional development programme that was funded by the Commonwealth Fund for Technical Cooperation. These in turn led to the drafting of a new Tourism Development Bill that would hopefully address most of the issues and problems that had been identified. With this Bill, the associated creation of a new Lesotho Tourism Development Corporation (LTDC) to replace the old Lesotho Tourism Board (LTB) that became defunct in 2000, the establishment of several new protected areas and the general rise in numbers of foreign visitors to the southern African region as a whole, tourism in Lesotho looks set to improve in the coming years.

With regards the development of tourism in Lesotho, especially that linked to the country's protected areas, there are presently several government ministries and departments that are involved. This causes a fair amount of confusion, lack of coordination, ambiguity and passing of responsibilities from one body to another. This can only result in the development of tourism in Lesotho being held back and the industry not being able to realise its true potential.

According to the Government Portfolio Act, the Ministry of Tourism, Sport and Culture is supposed to have jurisdiction over Lesotho's national parks and protected areas. In reality, the Ministry has very little jurisdiction or control, with responsibility for the country's protected areas being spread amongst various government and quasi-government bodies. For instance:

- the Sehlabathebe National Park, in the south-east of the country, falls under the control of the Department of Conservation, Forestry and Land Use Planning under the ***Ministry of Agriculture Cooperatives and Marketing***. Bookings for the Sehlabathebe Lodge are handled by the Department;
- the development of the Ts'ehlanyane and Bokong National Parks and Liphofung Cave Cultural Historical Site falls under the jurisdiction of the Lesotho Highlands Development Authority (LHDA) under the ***Ministry of Natural Resources***. Bookings are presently handled by Earthplan (Lesotho) Ltd, a private sector consultancy company tasked with establishing these two and one other protected area;
- the development of policy governing conservation falls under the jurisdiction of the National Environment Secretariat (NES) of the Department of Environment under the ***Ministry of Environment, Gender and Youth Affairs***.
- the proposed development of a small national park near Maseru is falling under the jurisdiction of the ***Ministry of Tourism, Sport and Culture.***
- the conservation of archaeological, historical and cultural aspects of national parks falls under the jurisdiction of the Protection and Preservation Commission of the Department of Culture in the ***Ministry of Tourism, Sport and Culture***.

As can be seen, no fewer than four government ministries are presently involved in the development and management of protected areas in Lesotho. It is probable that other government ministries also have a say as well. Coordination, therefore, of both protected area development and management of tourism in the country, therefore, is not as good as it could be.

With regards the development of the Liphofung Cave Heritage Site and the Ts'ehlanyane and Bokong National Parks, the five-year contract, under which Earthplan Ltd was to develop and handover the protected areas to the Government of Lesotho, is due to come to an end on 31st July 2001. However, there is still no government body to whom the protected areas can be handed over. It is therefore likely that Earthplan Ltd's contract will be extended another year, to enable the development and management of the sites to continue, or at least until an appropriate government body has been created or is delegated to take over responsibility.

The new Tourism Development Bill received its first reading in Parliament at the end of June 2000. At the time of writing, it was due for its second reading towards the end of July or early August 2001. The passing of the Bill, which is expected to take place with few problems envisaged, will allow for the establishment of the new LTDC under the Ministry of Tourism, Sport and Culture. This body will be the leading organisation responsible for the overall development and promotion of tourism in Lesotho. For this to happen successfully, however, there is clearly a need to review and rationalise the duties and responsibilities of the various government ministries and departments with respect to the tourism functions in which they are presently involved in some way or another.

The African Development Bank (ADB) is shortly due to lend funding to the tourism sector in Lesotho, but this is partly dependant on the successful creation of the new LTDC and recruitment of a chief executive officer for the organisation.

The country's national parks will play a central role in the development and success of tourism in Lesotho in the future. To enable this to happen, however, it will be important to ensure, as far as is possible, that both the tourism sector and the country's protected areas are developed and managed as an integral and coordinated unit. Without recognising and addressing the obvious common links, tourism development in Lesotho will be severely constrained.

With the present absence of the LTB, and its successor the LTDC, there is clearly no single body in Lesotho responsible for national parks and other protected areas. It appears, however, that present thinking, which is supported by the ADB, is to place the responsibility for national parks and conservation under the NES of the Ministry of Environment, Gender and Youth Affairs. A new parastatal body would be formed that has both private and public sector representation. Apparently, many existing Community Conservation Forums (see below) would favour this option, but only if the communities also have representation. The World Bank (WB), however, does not favour the establishment of parastatals as this is against their own investment policy. Clearly, then, there is disagreement between two major investment banks as to how a 'national parks' body should be established and under which ministry it should fall.

Furthermore, placing the new 'national parks and conservation' body within the Ministry of Environment, Gender and Youth, would obviously not address the need to ensure that tourism and national parks develop in an as coordinated and successful manner as possible. It is clear, therefore, that the Government of Lesotho still has much work to do with respect to setting up appropriate government bodies to manage tourism and conservation in the country.

The successful development of NRBCT in Lesotho, as with the tourism industry as a whole, will be hampered in the medium- and long-term if the overall coordination and management of tourism and national parks in the country is not improved. In this respect, the first step should be the review and rationalisation of the twin functions of tourism and protected area conservation at government level.

The principal government and private institutions involved in tourism in Lesotho are as follows:

- Ministry of Tourism, Sport and Culture, under which the now defunct Lesotho Tourist Board used to fall;
- Ministry of Agriculture Cooperatives and Marketing, responsible for tourist bookings in Sehlabathebe National Park;
- Ministry of Natural Resources, under which the LHDA is responsible for the development of tourist facilities in the Ts'ehlanyane and Bokong National Parks and the Liphofung Cave Cultural Historical Site and, in the future, the planned 'enviro-park' at Muela Dam;
- Lesotho Council for Tourism, umbrella body for the following associations:
- Lesotho Hotel and Hospitality Association;
- Lesotho Restaurant Owners Association;
- Lesotho Taxi and Bus Owners Association;
- Lesotho Archives and Museums Association, head office in Moreja; and
- Lesotho Arts and Crafts Association.

With the one exception, all these bodies and organisations have their main offices in Maseru.

3.5.2 KEY CHARACTERISTICS OF NRBCT

NRBCT has probably been operating in Lesotho for a number of years, although it has perhaps not been specifically recognised as such. The resource upon which NRBCT has been primarily based is the country's spectacular scenery and opportunities for outdoor activities. There is no wildlife-based NRBCT in Lesotho, due mainly to very low wildlife numbers in the country which has been brought about by the harsh mountain environment in the country and degradation of wildlife population numbers through the spread of settlement, subsistence hunting and competition with livestock. As far as can be ascertained, there is no CBNRM organisation in Lesotho that assists communities in developing tourism in their areas or coordinates NRBCT in the country.

There are six types of NRBCT in Lesotho.

Pony trekking. Pony trekking in the foothills and mountains of Lesotho is the most dominant form of NRBCT. In general, horses owned by individuals or families are hired out to tourists on an hourly or daily basis, usually accompanied by one or more guides. Income generated from such treks usually goes directly to the horse-owner, rather than to the owner's community. This, however, still ensures than money is injected into the local economy, which, probably without exception, benefits the community as a whole in some way or another. In some instances, the government or an aid organisation has purchased horses and/or equipment for the community to use in running and upgrading the pony trekking operations. In others, private sector operators may supplement the pony trekking herd with a few of their own horses. For some private sector operators, the pony trekking that is conducted by individuals from communities is a major activity that they can offer their own guests and forms a significant portion of their overall business.

Walking and hiking. Not all visitors to the mountains of Lesotho go on pony treks. A large proportion of visitors wish simply to walk or hike in the mountains on short or long excursions. Quite often, these hikers take along local guides. As with pony trekking, the income earned usually goes directly to an individual rather than a community.

Overnight hut stays. A number of the pony trekking and hiking trails incorporate one or more overnight stays in traditional Basuto huts. These seem to be hired out by the owners at a relatively uniform rate, with 100% of the fee being charged by the hut owner accruing to the owner himself. In most cases where private sector operators provide the guests, the hire fee is marked up by the operator. Monies paid are collected by the operator and passed onto the hut owner at a later date. Apparently, in many cases, the hut owner is the local chief or headman, so it is possible that income from overnight stays in huts does not benefit many people within the community.

Village visits. A number of villages encourage tourists to visit, offering guided walks, food and drink, as well as dancing and music. Usually, visitors pay the guides direct, presumably also paying for food and drink consumed.

Handicrafts. One of the more important forms of NRBCT in Lesotho, is the production and sale of a variety of handicrafts, mainly basketwork, weaving, pottery, dolls and beads. These are sold at small stalls along roadsides, or in outlets at lodges and hotels, or in markets in the larger centres, such as Maseru. Some of the crafts go through two stages of production, namely, an initial production stage at source; then a finishing stage in the major centres. Most formal retail outlets for crafts buy the crafts from source, or from an intermediary, and sell them at a marked-up price. Some, however, take a stock of crafts on a sale-or-return basis, retaining a percentage of the money paid and passing the bulk of the income to the relevant craftsperson. As perhaps can be expected, there do not appear to be any community-run craft markets where the principal beneficiaries are the communities themselves. Other than an Arts and Crafts Association, which is a product owners' body affiliated to the Lesotho Council for Tourism, there does not appear to be any overarching organisation that coordinates the collection and sale of crafts on behalf of communities other than for the purely commercial enterprises.

National parks. Perhaps the only true community-based tourism operations in Lesotho are those that have been set up as part of the establishment of three protected areas in Lesotho by a private consultancy company on behalf of the Lesotho Highlands Development Agency. The principal form of benefit in this case, other than jobs that are created, is the payment to the community, through a Community Conservation Forum (CCF), of a percentage of the revenue taken by the park or site. The size and composition of the three CCFs varies from site to site (6 to 20 individuals on the committees). The percentage of gross income presently accruing to the communities has been initially set at 10 %. This money is only spent by the CCFs on purely community projects.

3.5.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

In total, there are ***6 NRBCT operations*** in Lesotho. These are made up of:

- 2 x informal arrangements between private sector lodge owners and local residents for the hire of ponies and guides for pony trekking and hiking trails and other services;
- 1 x government-funded and run pony trekking operation that is presently undergoing difficulties
- 3 x revenue sharing partnerships between the government (through the LHDA) and local communities associated with the development of new state protected areas.

The 6 NRBCT operations, in very brief outline, are as follows:

#	Name of Operation	Type of Products	Beneficiary Community	Government/Private Sector Partner
1	Liphofung Cave Cultural Heritage Site	Overnight huts, horse trails, site trails, hiking, craft shop, museum, Bushman paintings dancing, singing, traditional food,	Liphofung CCF	Lesotho Highlands Development Authority & Earthplan (Lesotho) Ltd
2	Ts'ehlanyane National Park	Tented camp, bush camp, hiking trails hut, camp sites, hiking trails, craft shop	Ts'ehlanyane CCF	Lesotho Highlands Development Authority & Earthplan (Lesotho) Ltd
3	Bokong National Park	Visitor centre, craft outlet, hiking & walking trails, trails base camp,	Bokong CCF	Lesotho Highlands Development Authority & Earthplan (Lesotho) Ltd
4	Malealea	Pony trekking, hiking, village & school visits, hut stays, choir, band, *sangoma*, crafts	Malealea community	Malealea Lodge Ltd
5	Semonkong	Pony trekking, hiking, village visits, hut stays, crafts, traditional food	Semonkong community	Semonkong Lodge Ltd
6	Molima Nthuse Basuto Pony Trekking Centre	Pony trekking, picnicking	Molima Nthuse community	Department of Conservation, Ministry of Agriculture

Late mention was made of one other possible NRBCT operation in Lesotho. This relates to a pony trekking operation at Khohlontso, which was apparently set up under LHDA. Unfortunately, no information was obtained on this operation. It is understood, though, but not confirmed, that the operation at Khohlontso is suffering some difficulties.

As far as is known, there is only ***1 NRBCT initiative*** in the pipeline in Lesotho. This relates to the recently launched Lesotho Highlands Natural Resource and Rural Income Enhancement Project, funded by the ADB. The plan is to develop an 'enviro-park' at the Muela Dam, east of Butha Buthe that incorporates a significant community component. The facility would include a zoological garden (stocked with indigenous species found in Lesotho), a botanical garden, an environmental education centre, visitor centre, handicraft centre and day-visitor facilities. The community that would directly benefit from such a development numbers approximately 2,000 people. As yet, however, no specific funds have been set aside by ADB for this project.

3.5.4 Strengths and Weaknesses of NRBCT

The notable ***strengths*** in NRBCT in Lesotho include the following:

- with nature-based NRBCT being founded primarily on the scenic and outdoor qualities of Lesotho and not on wildlife, the NRBCT resource base is possibly more sustainable in the long-term with relatively little effort than a purely wildlife-based product which can be overexploited very quickly and seriously degraded;
- the success of using a private sector consultancy company in the development of protected areas, on behalf of the State, and with the participation of local communities has been well-demonstrated;
- demonstration of the need to have long lead-in times with community participation projects;
- genuine friendliness and hospitality of many rural people and communities.

The more notable ***weaknesses*** in NRBCT in Lesotho include the following:

- lack of clear government policy on responsibility for national parks and tourism development;
- no implemented policy on community tourism;
- lack of national CBNRM body in Lesotho;
- very few organisations working in CBNRM;
- all NRBCT operations are virtually entirely private sector- or government-driven – there are no wholly community-driven operations, although some smaller initiatives may now exist;
- many communities are proactively opposed to top-down initiatives that do not generate benefits in the short-term, or which are seen to be forced upon them – some government initiatives that have not gained local acceptance have simply been burnt to the ground;
- should a development look as though it will show no benefit to a community or individuals, support from the community is quick to evaporate, manifesting itself through theft and vandalism;
- NRBCT has to focus almost entirely on non-consumptive forms of tourism, based on scenery and culture, that take time to develop to fruition. As such, quick income from consumptive forms of tourism, such as trophy hunting, is not available;
- over the last 15 years, but particularly during the land acquisition phases, the Lesotho Highlands Water Project has unfortunately helped to develop a mindset amongst many communities of compensation for resources lost, rather than a culture of exploiting development opportunities that may have arisen due to the Project;
- lack of strict management has resulted in some instances in the partial or complete loss of equipment and material that has been made available to NRBCT initiatives and operations by government or donor agencies;
- individuals, rather than communities, generally receive the benefits from NRBCT – as such, communities usually only see benefit from NRBCT through the success of individual community residents/entrepreneurs;
- intra-community jealousies exist which are directed at individual entrepreneurs who appear to be benefiting ‘too much’ from tourism;
- in some areas, there is a strong struggle between traditional structures and aspirations and the more modern and/or democratic ones;
- donations and generosity from tourists towards community services, such as schools, can have severe social repercussions in some areas.

3.5.5 Principal NRBCT Marketing Issues Noted

There are three NRBCT marketing issues of note in Lesotho.

The first marketing issue of note is the present lack of a national tourism marketing body. This has had the immediate effect of not being able to provide Lesotho-based tourism product owners with a 'Lesotho' umbrella body under which they can market and promote their products at various tourism trade shows, especially Indaba in Durban and Getaway in Cape Town. It is also means that there is no government tourism marketing body to which private sector (and NRBCT) operators can turn to for assistance with product marketing and promotion and product development. Private sector and NRBCT operators are therefore left largely on their own, especially with regards marketing. In addition, the possibility of helping coordinate the future development of NRBCT at government level, especially with the lack of a national CNBRM body, becomes much less likely.

The second marketing issue relates to the continued marketing of those three protected areas that are currently being developed and managed by Earthplan Ltd, on behalf of the LHDA. At present, marketing of the three sites is being done by Earthplan Ltd. It is intended once the sites have been developed that the marketing of the sites would become the responsibility of the protected area management organisation that is assigned management responsibility for the sites. This hand over was supposed to take place on 31st July 2001. As mentioned above, however, such a body has still to be created or assigned the responsibility. The problem that arises with the absence of this management body, which would presumably also market the tourist products that have been developed, is further exacerbated by the temporary lack of a national tourist marketing body, in the form of LTDC. LTDC could, if desirable and necessary, handle the tourism marketing for all three sites (and others). But, until this body is established, this option is not available and a marketing void may be created.

The third marketing issue of note relates to the obvious fact (valid for many countries) that the short- to long-term success and viability of most, if not all NRBCT operations in Lesotho, are highly dependant on private sector involvement, input and support, especially with regards marketing. NRBCT operations rely almost exclusively on visitors that have been attracted to a specific area by private sector operations and their own marketing activities. If the private sector operators were to leave or undergo a period of poor business, NRBCT operations would be amongst the first to feel the pinch and perhaps go under. The NRBCT operations are an integral part and virtually wholly dependant on the products that the private sector offers tourists. Without the private sector product or marketing efforts, most NRBCT operations would simply disappear.

3.6 Malawi

3.6.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

The holiday-making tourism industry in Malawi is based primarily on the attractions of Lake Malawi, a number of national parks and protected areas and the country's scenery. Lake Malawi, though, is without doubt the principal attraction. Fringed in many spots by beautiful sandy beaches, dotted with numerous attractive islands and being home to a large number of endemic fish species, notably cichlids, the lake deserves its World Heritage Site status. It was, in fact, the world's first freshwater reserve.

Malawi has five national parks (Nyika, Kasungu, Liwonde, Lengwe and Lake Malawi) spread over the country and four nature and wildlife reserves. Many of these parks boast a diverse fauna, especially birds. However, although the 'big five' occurs in some of the parks, wildlife populations as a whole in the country have been decimated through commercial and subsistence poaching, encroachment of settlement and agriculture and logging. The country's Department of Wildlife and National Parks (DWNP) has just 300 officers and lacks the funding and equipment to satisfactory protect the estate that falls under its jurisdiction. There have, however, been several initiatives that are intended to help the country's beleaguered conservation and tourism sector, such as the SADC Wildlife Management

Training Programme and the more recent southern Shire parks initiative. In addition, there is an animal restocking programme currently underway, using animals translocated from both within Malawi and from outside of the country, principally South Africa. In the main, though, the capacity and capability of DWNP to administer Malawi's protected areas, especially during the current poor economy, must be questioned.

Malawi is somewhat divorced from the main stream of tourists attracted to southern Africa. At present, there are only two airlines (British Airways and KLM) flying into Malawi direct from Europe, with regional flights flying into Blantyre from Johannesburg, Harare, Lusaka, Dar-es-Salaam and Nairobi. Access to Malawi, therefore, by the great majority of inter-regional tourists is via a neighbouring country.

The road network within Malawi, although quite extensive, is generally poor. There are good tarred roads running north-south and linking major population centres, but once off these, roads can be in very poor condition. This is especially the case during the wet season.

Hotels and lodges in Malawi, with some exceptions, are generally poor by international standards and, in comparison with the country's regional competitors, are overpriced for the product offered. Registration and the setting and maintenance of standards is very much in the embryonic stage, with most lower market accommodation being unregistered and largely unregulated. Added to the poor quality of accommodation is the lack of training facilities for staff. Out of an estimated total of 2,900 employees in the hotel/lodge industry, only 460 (less than 16%) have any training – and even that is of limited quality. Unless this situation is addressed soon, the lack of training and skills will seriously impede the recovery and development of tourism in the country in coming years.

On a regional basis, and particularly compared with its neighbours Tanzania , Zimbabwe and Zambia (the latter two countries also being landlocked), Malawi receives relatively few visitors. The latest available tourism figures for Malawi are for 1999 (WTO, 2000), when less than 150,000 people visited the country. A breakdown of available figures is given below.

Arrivals in Malawi by region for the year 1999

Region of Origin	No. of Visitors	% of Total
AFRICA	**119,852**	**79.9**
Zambia	38,195	25.5
Mozambique	20,924	14.0
Zimbabwe	20,350	13.6
Other countries of Eastern Africa*	22,195	14.8
All countries of Southern Africa**	16,680	11.1
Other countries of Africa	1,508	1.0
EUROPE	**19,170**	**12.8**
UK, Ireland	11,051	7.4
Other countries of Europe	8,119	5.4
AMERICAS	No overall figure available	n/a
USA, Canada	4,220	2.8
OTHER	**6,691**	**4.4**
TOTALS	***149,933***	***100.0***

Source: World Tourism Organisation (October 2000)

From the figures, it can be seen that almost 80% of Malawi's visitors come from Africa with 31.9%, 17.5% and 17.0% coming from the neighbouring countries of Zambia, Mozambique and Zimbabwe. It is very likely that the great majority of this tourist traffic are VFRs or those visiting on business. The next largest regional market is Europe, but with only 12.8% of the total number of foreign arrivals. The

UK and Ireland account for 57.6% of this market, probably a fair mixture of VFRs, those on business and holiday-makers.

During 1999, the 149,933 visitors stayed a total of 1,013,257 nights, giving average stay of 6.76 nights per visitor. Comparable figures for 1997 show that 205,248 visitors arrived in Malawi and stayed a total of 1,436,721 nights. The average stay was 7.00 nights per person. The 1999 figures, therefore, are, respectively, 27.0%, 29.5% and 3.4% down on 1997.

The figures illustrate that, despite the obvious beauty and attractions and potential of Lake Malawi, the country's protected areas and other parts of the country, Malawi is nowhere near taking full advantage of the tourism resource bases it has. Economic mismanagement and political instability in the past have much to blame for the current situation. Unfortunately, though, the current poor state of the agricultural sector, the widespread occurrence of malaria and the significant affects of the HIV/AIDS epidemic, to name just a couple, all impact on the development. But, in many ways, a revitalised and expanded tourism industry offers Malawi perhaps the only realistic economic option for the country.

The Government, however, is taking a developmental approach to tourism. New tourism policies are being enacted and attempts are being made to put in place a policy framework to create the enabling environment for private sector investment. In addition, the government's support for the protected area-based initiatives mentioned above is a positive development. However, the Government's commitment to this process, especially with regards implementation on the ground and the support that is being given to the Ministry of Tourism, has to be questioned. For instance, during this study, communication by telephone or fax or e-mail with the Ministry of Tourism and DNPW was impossible. This was simply because, due to lack of money, the Ministry's telephone bill had not been paid and telephones had been disconnected. Communication had to be conducted through an intermediary – not a positive sign of commitment.

3.6.2 KEY CHARACTERISTICS OF NRBCT

What NRBCT there is in Malawi is very much low key and somewhat informal in nature. The main reason for this is probably linked to the general poor performance of the country's tourism industry as a whole. As has been stated elsewhere in this report, NRBCT is largely reliant on the presence off a relatively developed tourism industry and profile in the world tourism market. Regrettably, Malawi has neither. What NRBCT there is in Malawi appears to be very much *ad hoc* in nature and is probably driven more by the pressures of a poor and declining economy and the desperation of individuals, rather than a real desire and coordinated effort to become part of a national tourism industry. As far as was ascertained, there is no CBNRM institution in Malawi, and certainly no NRBCT body.

In general, though, people have become involved in NRBCT in Malawi in the following ways:

- providing guides for guests of hotels and lodges for tours of local villages;
- providing guides for canoe, boat and fishing trips on Lake Malawi;
- craft making, especially wood carvings – the availability and sustainable use of suitable wood species for carving is of major concern.

It is strongly believed that, unless the <u>mainstream</u> tourism industry in Malawi is entirely revitalised through the development and sustainable exploitation of Lake Malawi, at least some of the country's protected areas and, to some extent, the country's cultural tourism resource base, the future for NRBCT is not that promising. What NRBCT is developed, however, will provide some benefit to a number of individuals and small communities and it should be encouraged where possible. NRBCT in Malawi, though, is very much linked to the tourism private sector.

3.6.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

There appears to be only ***1 NRBCT operation*** of any note in Malawi. This relates to Chembe village on the southern shores of Lake Malawi, where a local private sector company runs an accommodation and kayaking operations within the village itself.

During 2000, DWNP helped Chembe village establish a Community Based Organisation (CBO), the first of its kind in Malawi, and an associated trust, the Chembe Trust. The intention was for DWNP to grant the village, through the CBO, a head lease. The CBO in turn sub-leases to a private sector operator, in this case Kayak Africa. Kayak Africa had already been operating in Chembe village through an informal arrangement for a number of years. Unfortunately, at the time of writing, details of the sub-lease are not know, but it appears that Kayak Africa pays an annual amount to the Trust.

Although this initiative is encouraging, there are some problems already associated with it. Many of these are probably linked to the speed at which the CBO and Trust were formed, largely, apparently, for the benefit of the private sector operator. In addition, the Trust does not appear to be very democratic as all members of the Trust were nominated by the chief without any recourse to the other 5,000-odd community members. This immediately brings into question what happens to the funds that are generated. It is very likely that problems will be caused in the future as the community, as a whole, demands more say in the disbursement of funds. DWNP, however, are working to ensure that the Trust becomes more transparent in its operations.

Nkhata Bay also has a few private sector operations that cater primarily for low-budget backpackers and hikers. There are some water sports and fishing, as well as a good sandy beach. Lodge owners take guests to visit some of the local villages as part of a cultural experience. Donations are given directly to villagers by tourists. One private sector operator, Donga Tours, involves a neighbouring community in an afforestation conservation programme.

In addition to the above, Cape MacClear in Lake Malawi National Park has some NRBCT 'operations', but these generally are of very poor quality and usually consist of privately-owned operations where the communities may receive some sort of payment. In the majority of cases, however, these payments seem to go to the local chief. One of these camps is used primarily by unreconstructed hippies who visit simply to smoke pot and 'chill out' – the quality of accommodation very much reflecting the quality of the tourist. For purposes of developing a directory of NRBCT operations in SADC, which Malawi and the region as a whole can feel proud of promoting, these type of operations are considered inappropriate.

Central African Wilderness Safaris, which owns and operates Mvuu Camp in Liwonde National Park south of Lake Malawi, employs 65 of the 80 camp employees from the local community. This figure includes all guides and middle management. The company estimates that up to 1,000 people are dependent on employment generated by the camp. Guests of the camp are taken on 'community tours' as a means of encouraging donations for schools and other developments. However, there is no CBO and fees are not charged by the community.

A Dr Griffin Chinkuta owns and runs an organic farm at Dowa, which attracts a number of visitors from Europe, mainly Germany and the Benelux countries, although exact numbers are not available. The farm offers overnight accommodation for up to ten people. Local women have been encouraged to set up services for the farm, such as a restaurant and a craft shop, in an effort to make money. This operation, however, appears to be more private sector in nature than community, although the local community will undoubtedly benefit from the existence of the organic farm and the visitors it attracts.

There are ***3 NRBCT initiatives*** underway in Malawi. These all relate to government efforts to initially establish three cultural villages in Malawi as part of a planned suite of 12 similar such villages representing each of the 12 main tribal groupings found in Malawi. Project funds are presently being sought for the first three. Ultimately, government wants to set up pilot projects that would be handed over to local communities in due course.

3.6.4 STRENGTHS AND WEAKNESSES OF NRBCT

[MORE]

3.6.5 PRINCIPAL NRBCT MARKETING ISSUES NOTED

[MORE]

3.7 Mauritius

3.7.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

The tourism industry in Mauritius is based almost entirely on the attractions of the country's coastline, beaches and seaboard and, to some extent, on the capital, Port Louis, being an important business centre. Crafts and other forms of cultural tourism feature to a small degree, while there is no nature-based or community tourism to speak of. Tourism, overall, is of a high value, up-market nature and the industry as a whole is, without doubt, one of the best developed and coordinated in the SADC region.

The most recent tourism statistics that are available for Mauritius are for April 2001, but these are not in a fully analysed form. The latest annual statistics, however, show that Mauritius received a total of 656,453 tourist arrivals in 2000. Some of the more relevant statistics are broken down as follows:

Arrivals in Mauritius by region and country of residence for the years 1999 and 2000

Country of Residence and Region	1999		2000		% Change in No. of Visitors
	No. of Visitors	% of Total	No. of Visitors	% of Total	
EUROPE	**378,761**	**65.5**	**439,989**	**67.0**	**+ 16.2**
Austria	8,095	2.1	8,874	2.0	+ 9.6
Belgium	9,586	2.5	10,998	2.5	+ 14.7
France	175,431	46.3	198,423	45.1	+ 13.1
Germany	45,206	11.9	52,869	12.0	+ 17.0
Italy	36,675	9.7	39,000	8.9	+ 6.3
Netherlands	4,110	1.1	4,925	1.1	+ 19.8
Spain	6,204	1.6	7,226	1.6	+ 16.5
Sweden	4,552	1.2	5,694	1.3	+ 25.1
Switzerland	16,281	4.3	20,473	4.7	+ 25.7
United Kingdom	58,683	15.5	74,488	16.9	+ 26.9
CIS	1,476	0.4	2,083	0.5	+ 41.1
Other European	12,462	3.3	14,936	3.4	+ 19.9
AFRICA	**156,314**	**27.0**	**163,921**	**25.0**	**+ 4.9**
Comoros	728	0.5	945	0.6	+ 29.8
Kenya	1,655	1.1	1,801	1.1	+ 8.8
Malagasy Republic	7,880	5.0	7,057	4.3	– 10.4
Reunion	83,749	53.6	86,945	53.0	+ 3.8
Seychelles	7,893	5.0	9,229	5.6	+ 16.9
South Africa	46,583	29.8	48,683	29.7	+ 4.5
Zimbabwe	2,606	1.7	3,435	2.1	+ 31.8
Other African	5,220	3.3	5,826	3.6	+ 11.6

Country of Residence and Region	1999		2000		% Change in No. of Visitors
	No. of Visitors	% of Total	No. of Visitors	% of Total	
ASIA	**28,442**	**4.9**	**34,907**	**5.3**	**+ 22.7**
Hong Kong	859	3.0	1,227	3.5	+ 42.8
India	13,583	47.8	17,241	49.4	+ 26.9
Japan	2,324	8.2	2,389	6.8	+ 2.8
Malaysia	1,529	5.4	1,616	4.6	+ 5.7
China	2,189	7.7	2,459	7.0	+ 12.3
Singapore	3,661	12.9	4,104	11.8	+ 12.1
Other Asian	4,297	15.1	5,871	16.8	+ 36.6
OCEANIA	**8,503**	**1.5**	**9,460**	**1.4**	**+ 11.3**
Australia	8,076	95.0	8,771	92.7	+ 8.6
Other Oceanian	427	5.0	689	7.3	+ 61.4
AMERICA	**5,831**	**1.0**	**7,680**	**1.2**	**+ 31.7**
USA	3,345	57.4	3,704	48.2	+ 10.7
Canada	1,506	25.8	1,812	23.6	+ 20.3
Other American	980	16.8	2,164	28.2	+ 120.8
OTHERS	**234**	**0.1**	**496**	**0.1**	**+ 112**
TOTALS	***578,085***	***100.0***	***656,453***	***100.0***	***+ 13.6***

Source: Mauritius Ministry of Tourism

It can be seen from the table that just over two thirds (67.0%) of the tourists visiting Mauritius in 2000 reside in Europe, with a quarter (25%) of the tourists originating from Africa. The third largest market, with only 5.3% of the total number of visitors, is Asia, with Oceania, the Americas and 'other' countries comprising only 2.7% of the total number of tourists.

Of the European countries of origin of tourists, close on half (45.1%) the tourists came from France, with the UK being the second largest market (16.9%), followed by Germany (12.0%) and Italy (8.9%). Tourists from CIS, made up of the former Soviet Union countries, represent the fastest growing market from Europe (41.1% increase over 1999 figures), followed by the UK (26.9% increase)

For the African region, more than half (53.0%) of the tourists come from nearby Reunion, presumably mostly for business, with South Africa being the next largest market (29.7%). The fastest emerging market in Africa is Zimbabwe (31.8% increase) closely followed by Comoros (29.8% increase), again presumably business-linked.

With regards the current more minor markets, half (49.4%) of the tourists visiting Mauritius from Asia come from India, with Hong Kong being the fastest emerging Asian market (42.8% increase). The great majority (92.7%) of the tourists from Oceania come from Australia (the figures presumably also including visitors from New Zealand), while half (48.2%) of visitors from the Americas originate in USA. A 112% increase in the number of visitors from American countries other than USA and Canada seems to imply that this market segment is developing rapidly.

The tourism industry in Mauritius is generally all year round, with the quietest month being June, coinciding with the coolest time of the year. The most popular months of the year are August and October to January. In fact, however, the flow of tourists to Mauritius on a quarterly basis is fairly constant. During 2000, for instance, the first quarter of the year attracted 25.5% of the total visitors for the year, while subsequent quarters received 22.3%, 24.2% and 28.0%, respectively, of the total.

There are a total of 95 hotels in Mauritius with 8,660 rooms and an average of 2.9 beds per room. An approximate total of 6.5 million bed-nights were sold and the average length of stay for each visitor was

10 nights. Average room occupancy was 70%. Direct employment within the larger hotels (above 80 rooms) accounts for 18,571 jobs.

The average expenditure of tourists in Mauritius in 1998 (the latest available figure) was Rs21,075 (US$727*), with tourists from the UK tending to spend the most during their stay (Rs32,126 or US$1,108). Tourism generated a total of Rs14.2 billion (US$484 million) in receipts during 2000, 4.1% up on the previous year, representing approximately 5.5% of Gross Domestic Product (GDP). This figure may seem surprisingly low, especially as Mauritius is perhaps best known around the world for its tourism industry. However, Mauritius also has a very well developed textile, sugarcane and shipping industry, with finance being a rapidly emerging economic sector.

At present there, is no NRBCT component to the tourism industry in Mauritius. However, steps have recently been taken at ministry level to promote community involvement in future tourism developments in the country and, perhaps, to develop a form of NRBCT. In many ways, this initiative to expand the type of tourism product available in Mauritius and to distribute the benefits of tourism more widely has been forced upon the authorities in the country following the civil riots that took place in Mauritius in February 1999.

Although the specific cause of the riots had nothing to do with tourism in the country, the riots that were precipitated nevertheless provided an opportunity and platform for employees within the tourism industry in Mauritius to voice there anger and concerns about the exploitation and poor conditions of service of tourism employees that seemed to be prevalent at the time and which had been ongoing for many years. Other groupings in the country also took the opportunity of the civil disturbances to voice their own grievances. The riots, therefore, were not just limited to problems within the tourism industry.

With some degree of justification, many employees within the tourism industry felt that most private sector tourism operators in Mauritius had benefited considerably from the upmarket, beach-based form of tourism that had developed over the years, but that the employees themselves were not benefiting as much as they should from this growth and financial success. The majority of employees believed that wages and salaries were too low and that the interest and concern shown by their employers towards the well-being and welfare of their employees and their families was just too little.

Following the riots, the government authorities in Mauritius took note of the many of the grievances raised. Within the tourism sector, efforts were made to incorporate issues into future tourism development plans for the country, with adjustments being made to the tourism development model in use at the time. In 1999, for instance, the Ministry of Economic Development, Productivity and Regional Development appointed Deloitte and Touche to prepare tourism development plans for Mauritius and the neighbouring island of Rodrigues. The Ministry of Tourism was designated the supervising agent, while the project was funded by the EU and the Government of Mauritius.

The Tourism Development Plans identified a number of areas within the country for the rejuvenation of the tourism product currently on offer and the development of tourism in previously undeveloped areas. Examples include the Grand Baie Waterfront at the northern tip of Mauritius, the area around Trou d'Eau Douce in the east of the island, the Flic en Flac Public Beach on the west coast southwest of the capital and the Port Mathurin Town Centre on the island of Rodrigues.

The individual 'development briefs' for these initiatives give indications of the various opportunities and constraints, development potential, development framework and cost estimates and benefits and provide architectural concept diagrams of the various infrastructural developments that are planned. By-and-large, though, the briefs are primarily to do with urban design, with the need to consult with

* Approximate exchange rate of Rs 29 per US dollar.

communities and the benefits that can accrue to communities (mostly recreational, employment and business opportunities) being mentioned but not tackled in detail. However, all of them have very little to do with NRBCT as the concept applies in most SADC countries. It is possible, though, that the community component of tourism development plans received more treatment in other reports produced during the project that were not immediately available to this present study.

The government has also recently set up a central fund for small, medium and micro enterprises (SMMEs), aimed particularly at helping develop and assist small and medium-sized hotels in the country. Indeed, there are plans to build upwards of 25 new hotels in Mauritius.

From the tourism private sector angle, many hotel owners and managers are now adopting a more responsible attitude towards the concerns and aspirations of their employees and immediate families. This is being encouraged, and perhaps driven to a certain extent, by the government in an effort to develop a more socially responsible tourism industry in Mauritius.

The principal government and private sector institutions involved in tourism in Mauritius are as follows:
- Ministry of Tourism and Leisure, under which falls the Mauritius Tourism Promotion Authority and the SADC Tourism Sector Coordinating Unit;
- Mauritius Tourism Promotion Authority, responsible for marketing tourism in Mauritius as a whole;
- Ministry of Womens' Rights and Child Protection;
- Ministry of Cooperatives;

3.7.2 SUMMARY OF NRBCT INITIATIVES

Although there are no NRBCT products in Mauritius, there are **2 NRBCT initiatives** currently underway or in the pipeline that this study is aware of.

The first initiative, which has only been in the pipeline since about April 2001, relates to the rehabilitation and development of the village of Chamarel, located in the south-western corner of Mauritius. The Chamarel community consists of approximately 600 people belonging to 163 families. The Ministry of Tourism is trying to involve the community in the integrated development of the village and the Chamarel Village Council appears to be very much behind the project. [Village councils represent the lowest level of government and fall under the five municipal councils in Mauritius.] It is proposed by both the MTPA and the Village Council to construct an amphitheatre for outdoor entertainment (eg. *sega* shows) and develop the cultural aspects that are a feature of the village, such as table d'hôte, handicrafts (eg. coloured earth, woodcarvings, objects derived from coconuts), artists (eg. local paintings), singing and social interaction with villagers. How representative of the community the village council is, is not known, but it is likely to be at least fairly representative of community views and interests. A number of other government bodies are involved, including the ministry of Cooperatives, the Ministry of Womens' Rights and Child Protection and the Trust Fund for Vulnerable Groups. Training in a variety of fields has also started. The Chamarel project, therefore, is perhaps one of Mauritius' best opportunities to develop a form of NRBCT in the short-term.

The other NRBCT initiative, which has distinct promise for the future, relates to the island of Rodrigues, which is a relatively undeveloped island, certainly with regards tourism. In discussions with the MTPA, it is apparent that the government would like to see the development of tourism on the island being done with much closer cooperation and involvement with the local residents than has occurred previously in Mauritius. In pursuing community-based tourism on the island as a principal objective, issues such as community landownership, partnerships between communities and the private sector, the payment of market- and performance-related concession fees and variable fees or other forms of payment by private sector operators to local communities, the formulation of concession agreements or contracts and developing a feeling of 'ownership' amongst the community towards tourism developments would be taken into consideration. It seems, however, that the process of translating these good intentions and ideas into something tangible, especially with regards ways of bringing together communities and the private sector and establishing strong and mutually-beneficial partnerships, is very much in the early stages. However, with the dynamism displayed by MTPA and the Ministry itself, significant progress should be made sooner rather than later.

3.7.3 Principal NRBCT Marketing Issues Noted

Of all the countries visited during this study, the marketing and promotion that is conducted by the Mauritian tourism authorities, particularly the MTPA, is perhaps amongst the best developed and most successful in the region. With there being no NRBCT in Mauritius at present, although some initiatives are being developed, principal issues regarding the marketing of NRBCT are somewhat premature. However, if the development of NRBCT progresses is a planned and coordinated manner, and perhaps some of the recommendations made in this study are taken on board, the marketing of NRBCT should receive the attention it deserves in the future.

3.8 Mozambique

3.8.1 Brief Overview of Tourism Industry

Mozambique is currently undergoing a period of economic reconstruction and rehabilitation, following an extended civil war that began soon after the political breakaway from Portugal in 1974. The country has now experienced 10 years of peace and it looks as though, despite numerous social and economic problems to be resolved (not helped by several recent natural disasters), that the country is on the mend.

During the years of conflict, tourism in Mozambique was very much on hold, although tourists, especially from South Africa, still visited the capital Maputo and some of the offshore islands. During the last decade, and particularly during the last five years, tourism has developed quite substantially.

Today, the Mozambique tourist industry is still focused almost entirely on the Indian Ocean coast, where pristine beaches, relatively untouched coral reefs and deep-sea fishing are the principal attractions. The Swahili Coast, which begins in Somalia, extends southwards through Kenya and Tanzania down to the Mozambique Island (a World Heritage Site), which lies off the coast of central Mozambique. To the characteristic African/Arab culture is added the additional element of 500 years of Portuguese cultural interaction. This gives the familiar features of Swahili Coastal culture an additional layer of interest. In addition to its scenic, nature-based attractions, Mozambique also has skilled crafts people, an interesting and distinctive cuisine (especially in the Zambezi region) and warm Latin-tinged culture.

Most of the tourist development in the 1990s has taken place along the coast in two principal areas, namely:

1) the area to the north and south of Maputo where a number of lodges and hotels that have been rehabilitated or built. It is in this region that approximately 40% of all hotels in Mozambique are found; and
2) the central part of the country off the coastline of Beira and Inhambane. Developments here are intended to exploit the Zimbabwe market. Further away from the coastline, some wildlife-based tourism is being developed.

It has not been possible to obtain statistics on tourist arrivals in Mozambique. None were obtainable during the field visit from the Ministry of Tourism, while the WTO's *Tourism Market Trends: Africa – 2000* document does not give figures. It seems possible, therefore, that tourism statistics have not been collected in recent years, or, if they have, they are simply not easily available. In 2000, however, it is known that there were 157 hotel establishments in Mozambique with 2,978 rooms and 5,382 beds.

A new Ministry of Tourism was created in 2000, raising the profile of the industry significantly. Furthermore, in relation to natural resources, the administration of the country's national parks was also moved from the Ministry of Agriculture to the Ministry of Tourism. [At the time of this study the organisational details of managing national parks from the Ministry of Tourism were still being sorted out.] There are also a few private sector tourism associations, one being the Association of Hoteliers of Inhambane. In addition, there are apparently several informal tourism operator groups in the provinces of Gaza and Zambezi.

Community tourism in Mozambique has generally been nurtured by the National Directorate of Forestry and Wildlife (DNFFB), with the support of a variety of NGOs and international donor programmes. These include IUCN, WWF, Food & Agriculture Organisation (FAO), _____ (IDRC), the Ford Foundation and the Global Environmental Facility (GEF).

3.8.2 KEY CHARACTERISTICS OF NRBCT

Community tourism in Mozambique had its' beginnings in 1994 when the Tchuma Ttchato Pilot Project was initiated in Tete Province. The project was conceived as an approach to resolve conflicts between one community and a tourist operator, as well as a pilot programme in community management of natural resources (Filimao *et al*, 2000). CAMPFIRE and ADMADE (see **SECTIONS 3.15** and **3.14**, respectively) were the most influential CBRM programmes on this project.

The relationship that developed in the pilot project had three principal players, namely: government (national and district); the commercial operator; and the community. The basis of community involvement was largely founded on the three-way distribution of revenue generated by the commercial operator. The community was represented by an elected natural resource management committee.

In other areas of the country, notably Bazaruto Island, other approaches to community participation involved raising levies from hotels and paying them out to communities. International NGOs, including IUCN and WWF with the support of international donor funds, have been involved with the Mozambican government in fostering, encouraging and training communities and commercial operators in these approaches.

In general, though, benefits that are paid to village cooperatives are passed on to individual members, while revenue from hunting concessions, village chalets, *bandas* and campsites goes into funding village development projects, such as grinding mills, schools and electric fences.

In the case of Bazaruto Island, where the operation is not a product of the community itself, funds generated by the industry make their way into community development. The five private sector tourism operators on the island charge a community levy on all guests. These levies are collected together and divided equally between the five villages, the total population of which numbers about 4,500 people. This operation is therefore an example of revenue sharing. Unfortunately, the study was not able to find out to what type of community or village structure the payment is made and how the payment benefits members of each community.

There three types of NRBCT in Mozambique.

Hunting concessions. The right to hunt on community land is granted by the government and communities receive payments from the private sector safari hunting company.

Chalet and campsite operations. These are run either by communities themselves or by the private sector, with communities receiving benefits in the form of employment, direct income or levies.

Craft cooperatives. Members of the craft cooperative receive payment on crafts sold.

Overall, Mozambique certainly has the potential for developing a diverse and significant NRBCT sub-sector. What is lacking, however, is a drive for product development that has a clear strategy for local community members to take the lead.

3.8.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

In total, there are ***2 NRBCT operations*** in Mozambique. These are made up of:

- 1 x craft cooperative;
- 1 x operation consisting of two hunting concessions, community chalets and campsite and a sport fishing component.

The 2 NRBCT operations, in very brief outline, are as follows:

#	Name of Operation	Type of Products	Beneficiary Community
1	Tchuma Tchato	2 x hunting concessions; sport fishing; community chalets (*bandas*)	Tchuma Tchato community
2	Madjadjane Natural Resources Management Committee	Crafts; cultural dance shop	Madjadjane community

In addition to these, mention was made during the study of Paindane Lodge on Praia Paindane in Inhambane. Apparently, Chief Paindane has an agreement with the lodge owner, but the study was unable to get any details on the operation.

As far as is known, there is only ***1 NRBCT initiative*** on the go in Mozambique at the moment, although it is likely that there are others. The one is question relates to ten hunting concessions in the Niassa Province that are to be put out to tender to safari hunting companies by the Sociedade de Reserva do Niassa.

3.8.4 STRENGTHS AND WEAKNESSES OF NRBCT

The notable ***strengths*** in NRBCT in Mozambique include the following:

- Mozambique has gone along way to sorting out issues relating to: 1) community management of surrounding natural resources and working with hunting concession companies; and 2) improving marketing of crafts to tourists along rural routes;
- the potential for growth of community tourism, based on the country's natural resources, rich history, culture and skills, is enormous;
- policy and legislation on community land use rights is in existence.

The more notable ***weaknesses*** in NRBCT in Mozambique include the following:

- limited educational opportunities in rural areas and virtually no experience of tourism in areas where wildlife is the basis of the tourism industry;
- no clarity in the Ministry of Tourism of the role they could or should play in developing community tourism;
- the basic lack of a support framework to develop community tourism was recognized by everyone interviewed;
- the Tchuma Tchato model is at present heavily weighted towards a community-wide ownership and community-elected management body for the activity. This may be inevitable for the wildlife operation. But community-wide ownership brings its own difficulties, such as issues of transparency and the difficulty of re-investing revenue to the benefit of all. Certainly, the

reports that the study has obtained do not mention significant employment or the identification of opportunities for the provision of services (eg. in sport fishing and hunting operations) or goods to visitors coming to the area.

3.8.5 PRINCIPAL NRBCT MARKETING ISSUES NOTED

Neither NGOs, nor associations, nor government have any marketing strategy for community tourism to speak of. Attempts to track down evidence of community tourism operations and products in Mozambique on NGO websites, or on the national tourism website, or on the commercial operator websites came to very little. What was discovered, however, was interesting and included accounts of a visit to a local restaurant in Inhaca Island (Restaurant Lucas), an adventurous trip to the Ilha de Mocambique and to Ibo Archepelago with local fishermen[*] and an account of a walk around the city of Maputo. In Maputo, several people mentioned the existence of locally run bed-and-breakfast establishments on the Inhambane coast. In general, though, marketing and promotion of community tourism operations is very poor.

3.9 Namibia

3.9.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

Namibia is a country that is full of wide-open spaces and spectacular scenery, including the world's oldest desert, the Namib, and the bleak Skeleton Coast. Namibia's tourism industry is distinguished by its unique mix of culture, scenic desert landscapes, geological phenomena and wildlife.

South of the capital city Windhoek is the Namib Desert. This stretches all the way to the ocean and the magnificent wind-driven sand dunes of Sossusvlei, claimed to be the highest sand dunes in the world. The ancient gorge at Sesriem Canyon and the wilderness of the Namib-Naukluft Park are also found in the area. Further north, up the coast, lies the old German seaside town of Swakopmund with the nearby seal colony of Cape Cross and the treacherous Skeleton Coast. Heading inland, the scenery changes dramatically in the flat-topped mountains and rock formations found in Damaraland. The rock engravings at Twyfelfontein are one of the most famous sights in the country. The world-renowned Etosha National Park, which boasts the 'big five' and a diverse range of wildlife species, is found in the north of the country towards the border with Angola. The country's northern regions, however, including the Caprivi, are less developed but still hold significant tourism potential.

Additional plus points for tourism in Namibia are its well-developed infrastructure and an extensive choice of parks, resorts and accommodation establishments. The latter range from five-star luxury hotels and up-market guest lodges to simple and rustic accommodation in or near villages or in remote areas.

The most recent tourist statistics for Namibia that were available to the study are for 1998 (WTO, 2000). These show that Namibia received a total of 559,674 international arrivals in 1998. These are broken down as follows.

Arrivals in Namibia by region for the year 1998

Region of Origin	No. of Visitors	% of Total
AFRICA	**429,532**	**76.7**
South Africa	209,318	37.4
Angola	177,316	31.7
Botswana	18,589	3.3
Zambia	9,317	1.7
Zimbabwe	8,395	1.5

[*] See http://www.paarlpost.com/archive/240820/people.html

Other countries of Africa	5,597	1.0
EUROPE	**111,113**	**19.9**
Germany	59,623	10.7
UK	13,992	2.5
France	6,156	1.1
Italy	5,597	1.0
Austria	5,541	1.0
Switzerland	4,702	0.8
Scandinavia	3,358	0.7
Spain, Portugal	2,686	0.5
Other countries of Europe	9,458	1.7
AMERICAS	No overall figure available	n/a
All countries of Northern America	10,074	1.8
OTHER	**8,955**	**1.6**
TOTALS	***559,674***	***100.0***

Source: World Tourism Organisation (October 2000)

More than three-quarters of visitors were from African countries, with South Africa and Angola contributing the most. In actual fact, these two countries between them account for 69.1% of foreign visitors. Most of those from Angola are probably VFRs, while those from South Africa are a mixture of VFRs, businesspersons and self-drive holidaymakers. With Namibia, or the former-South West Africa, previously being a German colony, it is not surprising that the largest European market is Germany. Germany accounts for 53.7% of European visitors.

Studies have shown that approximately 50% of visitors to Namibia travel by road, for an average stay of 3-7 days, with as many tourists staying in nature reserves and caravans as stay in hotels. Tourism in Namibia, therefore, is characterised by a high number of self-drive tourists who stay where they can along tourist routes. This has important implications for NRBCT in Namibia.

The following tables give an indication of the number of persons/trips across Namibian borders. As can be seen, the figures are approximate.

Distribution of persons/trips across the Namibia borders according to mode of transport used

Mode of Transport	Number of Persons / Trips*	% of Total
Air	230,000	42.6
Road	270,000	50.0
Rail	40,000	7.4
TOTALS	***540,000***	***100.0***

* Excludes persons travelling between Swakopmund and Walvis Bay and passengers of Namib Air

These figures show that half of the people entering Namibia do so by road, with slightly less numbers entering through the country's airports.

Of the 270,000 people entering Namibia by road, 166,000 (61.5%) of them are non-Namibians, according to the studies that were done. The following table gives an indication of the purpose of trip for non-Namibian visitors entering the country by road.

Distribution of persons/trips across the Namibia borders according to purpose of trip

Purpose of Trip	Non-Namibians entering Namibia by Road	
	No. of Persons/Trips	% of Total
Holiday	75,000	45.2
VFRs	20,000	12.5
Business	65,200	39.2

Emmigrating/Immigrating	2,100	1.3
Studies	1,300	0.8
Other	1,600	1.0
TOTALS	***166,000***	***100.0***

Close on half (45.2% in fact) of non-Namibian visitors entering by road travel to Namibia on holiday, with a further 12.5% visiting as VFRs. Another 39.2% enter on business.

Distribution of persons/trips by road according to type of vehicle used

Type of Vehicle	Number of Persons / Trips	% of Total
Motorcar	200,000	74.1
Goods vehicle	50,000	18.5
Bus	20,000	7.4
TOTALS	***270,000***	***100.0***

More than 74% of the total number of visitors entering Namibia do so by motorcar, implying that a great number are self-drive visitors.

The following two tables give an indication of the length of stay of visitors to Namibia and the type of overnight accommodation they use.

Number of days spent in Namibia by non-Namibian resident visitors

No. of Days	No. of Persons	% of Total
Less than 1 *	14,200	8.6
1 – 3	49,400	29.8
4 – 7	42,900	25.8
8 – 15	30,800	18.6
15 – 30	14,700	8.9
31 – 90	12,100	7.3
More than 90	1,900	1.0
TOTALS	***166,000***	***100.0***

* Persons entering and leaving Namibia the same day

More than half (55.6%) of non-Namibian visitors entering by road stay for 1-7 days, with quite a high percentage (18.6%) staying for an additional week.

Number of person days according to place of stay

Place of Stay	No. of Person-Days	% of Total	Average No. of Persons per Day
Hotel	288,000	15.0	789
Private House	1,013,000	52.6	2,775
Holiday Flat	138,000	7.2	378
Nature Reserve	116,000	6.0	318
Caravan Park	115,000	6.0	315
Other	256,000	13.2	701
TOTALS	***1,926,000***	***100.0***	***5,277***

Most of the nights spent in Namibia by non-Namibians are done so in private houses, presumably reflecting a high level of VFRs. Of interest, though is the 13.3% of person-days spent in ‘other’ accommodation. Although it is not possible from the available figures to say precisely what this type of accommodation consists of, perhaps a high proportion of it may be informal accommodation around the country. This could quite possibly include community campsites and the like.

Community based tourism (CBT) in Namibia developed initially under the CBNRM programme in the Department of Wildlife with various NGO partners and a variety of donors, including USAID's Living in a Finite Environment (LIFE) Project. CBT is described as being aimed at achieving "appropriate development of communal area tourism resources. . . . . with special benefits for rural residents". Originally, the major focus was conservation but this has now deepened to include tourism business criteria and objectives in which the Directorate of Tourism will have a more important role. The EU is presently providing technical support to the Directorate to develop their capacity to work with CBT. The objectives for the Directorate are to achieve:

- a balance between the number of destination facilities (accommodation, transport, guiding) and the natural attractions found in Namibia;
- balance between the type of facilities offered and the various market segments, not ignoring the needs of the domestic market;
- development based on adapting established patterns of tourism behaviour in the country in order not to cut off established markets;
- development of human resources within communities so that they can fulfil the requirements of managing and understanding the appropriate utilisation of the tourism attractions and facilities; and
- institutionalising the support for appropriate development approaches within the ministry of Environment and Tourism, the National Tourism Board and support NGOs.

There is an array of NGOs working in CBNRM and in NRBCT in Namibia. These range from those with have their main focus on conservation objectives to those with more community development related objectives. The key management structure for them all has been the development of the existing concept of "conservancy" for communal area lands, which was largely spearheaded by WWF-USA under USAID's LIFE Project based in Windhoek. Conservancies are described in the following manner:

> *"Communal land conservancies can be formed by a community or group of communities within a defined geographical area which jointly manage, conserve and utilize the wildlife and other natural resources within the defined area."*
> *"Conservancies are a way in which communities can improve their economic and social conditions through managing, using and benefiting from wildlife."*
>
> [Communal Areas Tool Box, 1998]

Conservancies can enter directly into agreements with the private sector and make their own decisions on how to spend the revenue generated from wildlife-related activities. Conservancies encourage their member communities to develop tourism-based enterprises. As of August 2001, conservancies did not have rights over non-consumptive uses of wildlife or of other resources so they could not negotiate concessions for lodge developments and guided tours within conservancies. However, this is now addressed in and is part of newly drafted tourism legislation.

WWF assists conservancies to build their capacity to undertake their responsibilities adequately. WWF is presently working on sample leases for contracts between communities and the private sector.

NGOs, like Mud Hut, provide technical marketing support for community cottage industries to improve design and quality control of handicrafts, to package high-value and unusual food items, such as the Kalahari truffle or products made from indigenous species such as *marula*, oils and soaps.

The Namibian Community Based Tourism Association (NACOBTA) is the national association of community-based tourism enterprises. The association focuses its support on enterprises, in order to increase employment and generate income for a community development fund for use in the interests of the broader community. The association works on issues related to:

- co-operation with the private sector;
- human resource development (training, enterprise management skills); and
- marketing of the CBT product (product development, promotion, booking facilities).

NACOBTA is funded by a variety of donors including WWF-USA, the USAID LIFE Project, SIDA, DFID, EU, Dutch Environmental Fund and the United States Embassy.

3.9.2 KEY CHARACTERISTICS OF NRBCT

NRBCT products can be divided into: 1) facilities; and 2) goods and services. Facilities include campsites at the lower end of the tourist market, through chalets, bed-&-breakfasts and guesthouses in the middle range to upscale lodges and hotels at the higher end. Goods and services include restaurants, souvenir shops, transport and guides. Clearly the development of goods and services is highly dependent on the presence of facilities where large numbers of tourists stay, or a location where large numbers of tourists must pass by. Whatever the case, the primary target market are tourists *per se*, rather than tour operators, etc.

Site facilities are the major employment generator. They are the source of potential buyers for the goods and services, such as souvenirs and tours.

An important set of products for the tourist industry is the backward linkages to goods and services for the industry as a whole. These include air, rail and road transport, construction and a variety of other goods and services required by tourist operators (eg. vehicle service facilities, banks, wholesalers, etc).

CBT sites often have strong natural attractions, but they are relatively remote from major tourist sites. They all have an opportunity to develop facilities to attract the tourist. Communities tend to focus almost exclusively on the low-volume, inexpensive facilities, such as campsites, and certain goods and services, such as walking guides and handicrafts. What is certain, though, is that Namibia has extremely attractive sites of interest to visitors and communities are trying to carve out a tourism niche at these sites, largely successfully, by providing campsites and guides.

Campsites and guiding are by far the most common NRBCT products and activities in Namibia. The "traditional villages" are specially built for visitors in order to lessen the impact of tourists on the real villages. Diversity of the overall product is achieved through the diversity of natural attractions to be visited, as well as the development of cultural activities that are unique to specific cultures (eg. traditional game tracking and the gathering of *veld* products in Nyae Nyae). In several communities, the guesthouses and campsites are owned and run by individuals.

The following table gives an indication of the range and number of NRBCT products available in Namibia.

Diversity of NRBCT products in Namibia

Type of NRBCT Product	Number
Photographic concession joint venture	2
Hunting concession joint venture	1
Restaurants and bars	3
Accommodation (bungalows and serviced campsites, permanent tented camp)	15
Craft shops	5
Donkey cart rides	1

Guided nature walks, game viewing, bird watching	19
Horse riding	1
Traditional village and homesteads	4
Traditional dance and music	3
Traditional game tracking and *veld* product gathering	1
Total number of products	***55***

As can be seen, there is only one sport hunting concession (viz. Botswana and Zimbabwe), compared with many other largely non-consumptive forms of NRBCT. In this respect, is really does seem as though Namibia has progressed much further with non-consumptive forms of NRBCT than either Botswana or Zimbabwe. On the other hand, it does seem as though NRBCT in Namibia could expand more into consumptive tourism or sport hunting. If the lessons and experience of Namibia could be shared with Botswana and Zimbabwe, and most certainly *vice-versa*, there really does seem to be potential for these three countries to develop a broad-based and diverse NRBCT sub-sector with both consumptive and non-consumptive NRBCT operations and products to offer the tourist market. Other countries in the region could in turn learn and benefit from this.

There are now ten conservancies in Namibia, with several new ones in development. There are also six signed joint venture agreements between conservancies and the private sector. In a few of these the development of tourist facilities is in progress.

NRBCT in Namibia provides employment to rural residents both through joint ventures and, in a very modest way, through the campsites. Guiding and handicraft sales bring an income to the guides and craft producers themselves. Craft producers also sell wholesale to organisations like Mud Hut. The traditional village tours and guiding by local guides gives an insight into the history, way-of-life and culture of the area. In turn, the culture and way-of-life gains validation in the eyes of new generations within communities as they learn and tell visitors about their areas. The joint ventures provide income for community development.

3.9.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

In total, there are ***21 NRBCT products*** in Namibia. These are outlined in brief below.

#	Name of Operation	Type of Products	Beneficiary Community
1	Caprivi Arts & Culture Association (CACA)	Craft shop; live cultural performances	Producers
2	Mayuni Conservancy	2 x lodges, tented camp, campsite (serviced); guided walks;	Mayuni community
3	Mashi & Sheshe Crafts	Craft shop	Producers
4	N//goabaca Campsite	Campsite; guided walks	N//goabaca community
5	Salambala Conservancy	Campsite (serviced) with bird viewing hides; sport hunting & fishing lodge; photographic tourism; guides on request	Salambala community
6	Torra Conservancy	Camp with desert elephant tracking; star-gazing; trophy hunting	Torra community, employment, local services & businesses
7	Tsiseb Conservancy	Campsite & tented camp; guides for day treks & camping expeditions; craft factory tour; township tour	Individual guides & Tsiseb community
8	Spitzkoppe Community Development Association (SCDA)	Rest camp, campsites, bungalows & bar; guided mountain treks & walks;	Spitzkoppe community

#	Name of Operation	Type of Products	Beneficiary Community
		donkey cart rides	
9	Bruckaros Campsite	Campsite (basic); guided & self-guided walks	Group members (mostly women) & Bruckaros community
10	Penduka Craft Cooperative	Chalets; cultural village; café; crafts	Producers & womens' cooperative
11	Uibasen Conservancy	Campsite (serviced), country lodge; guides	Uibasen community through income & employment
12	Khowarib Conservancy	Campsite (serviced)	Khowarib community through income & employment
13	Kaoko Information Centre & Tour Guides	Information centre & tour guides	Guides & local school in Opuwo
14	Kunene Village Rest Camp	Rest camp (bungalows & serviced campsite)	Local primary school
15	Marienfluss Conservancy	Campsite (serviced)	Marienfluss community through income & employment
16	Ongongo Campsite	Camp site (serviced); game viewing	Participating individuals
17	Purros Campsite	Camp site (serviced); game viewing	Family business, revenue sharing with conservancy
18	Purros Traditional Village	Traditional village with craft sellers & guides	Purros Conservancy
19	Nakambale Museum	Museum with traditional homestead; rest camp with serviced campsite & traditional huts; guides	Income & employment
20	Omatako Valley Campsite	Campsite with guides; traditional game tracking & veld gathering; traditional dance & music; horse riding; craft shop	Income & employment to local community
21	The Nyae Nyae Conservancy	Campsites (basic)with guides; traditional hunting with Ju/hoansi hunters; game viewing; traditional dance & music; bird watching	Income & employment to local community

A total of ***2 NRBCT initiatives*** are also known about.

[MORE]

3.9.4 STRENGTHS AND WEAKNESSES OF NRBCT

The notable ***strengths*** in NRBCT in Namibia include the following:

- the mix of international projects, associations and NGOs in partnership with government and the private sector institutionalises NRBCT in Namibia in a way which bodes well for CBT growth. The responsibilities and roles for its development are spread amongst several NGOs;
- the community association, NACOBTA, is well-focused on CBO enterprise development and tourism marketing;
- NACOBTA has developed solid promotional products (brochures and a website) for the sub-sector and they are in regular communications with national and regional marketing agencies. The website is readily reached with the words "Namibia community tourism".

- Namibia continues to have donor support (EU) to institutionalise further the support system for community tourism.

The more notable ***weakness*** in NRBCT in Namibia include the following:

- communities with no experience in the tourism sector and limited formal education need technical and financial support in order to get up-and-running. Growth of the sub-sector is predicated on the effectiveness of short-term training to provide the necessary capacity for enterprise development. It is not clear that short term training will be adequate for the task and that those who do get the training will not be encouraged or tempted to leave the village;
- NGOs are dependent on donor funding which typically has a fixed duration. Can the NGO's survive the inevitable reduction in that source of funding? Certainly membership fees alone cannot sustain NACOBTA;
- the communities have focused on the low end of accommodation. They need to: 1) gradually improve the standards; and 2) look at ways of diversifying the types of accommodation available possibly through joint ventures.

3.9.5 PRINCIPAL NRBCT MARKETING ISSUES NOTED

Perhaps the single most important issue with regards marketing of NRBCT in Namibia is the role that NACOBTA plays on behalf of its members. Certainly, the NACOBTA website is an extremely important tool for promoting the existence of and products on offer at the various NRBCT operations. The biggest criticism of the site, however, is that it is not connected to or easily accessible from the national tourism website. This is a major failing, which, with very little effort in fact, could be quite satisfactorily addressed. Despite this, however, other countries within SADC can certainly learn from the NACOBTA website and the key role that the association plays in developing and assisting NRBCT in Namibia.

3.10 Seychelles

It was also not possible to undertake a field visit to Seychelles during this study. Again, requests for information were made direct to the relevant government body responsible for tourism, namely the Ministry of Tourism and Transport. Some information was forthcoming that gave a very brief perspective of the current tourism industry in Seychelles and the trends in overseas arrivals in the past few years. The limited treatment of Seychelles here was supplemented by Internet-based statistical information obtained from WTO.

3.10.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

The tourism industry in Seychelles relies primarily on the coastal and marine environment the islands have and on some unique terrestrial resources and attractions, especially relating to wildlife. These tourism resources are exploited almost entirely through the provision of the typical mid- to up-market hotels and resorts that are owned and run by conventional private sector tourism operators. There is no NRBCT as such in the Seychelles, most probably because (as in Mauritius) there has been no social, economic or business reason for developing any – bearing in mind that NRBCT will probably always be a very much poorer cousin to conventional tourism.

Up until the 1980s and early 1990s, tourist arrivals in Seychelles increased steadily, from 47,280 in 1982 to reach a peak of 130,955 in 1996. Since then, however, arrivals have declined gradually to 124,865 in 1999, before recovering slightly to 130,046 in 2000. Compared with global and regional trends in tourism arrivals over the past 10 years, Seychelles' performance has been inconsistent. According to the document, *Vision 21: Tourism Development in Seychelles 2001 – 2010*, the inconsistent performance of Seychelles' tourism industry is due largely to an increasingly competitive international travel and tourism industry, especially within the region where similar products exist, and a drop in quality levels of some tourist facilities and services within Seychelles. Lack of diversity of product within Seychelles is also put as a cause of the decline and lack of growth

The most recent comprehensive tourism figures available for Seychelles (1999 figures) are the World Tourism Organization statistics for 2000. This shows, as stated above, that Seychelles received a total of 124,865 international visitors in 1999. A partial breakdown of the figures is given below.

Arrivals in Seychelles by region for the year 1999

Region of Origin	No. of Visitors	% of Total
AFRICA	No overall figure available	n/a
South Africa	3,902	3.1
Mauritius	3,536	2.8
Reunion	3,047	2.4
EUROPE	No overall figure available	n/a
France	24,283	19.4
Italy	19,520	15.6
Germany	18,835	15.1
UK	15,306	12.3
Other (quantified) Europe	17,587	14.1
AMERICAS	No overall figure available	n/a
USA	2,619	2.1
ASIA	No overall figure available	n/a
CIS	2,635	2.1
India	952	0.8
AUSTRALASIA & PACIFIC	No overall figure available	n/a
OTHER	12,643	10.1
TOTALS	***124,865***	***100.0***

Source: World Tourism Organisation (October 2000)

Regrettably, again the way the statistics are presented for Seychelles in the WTO figures does not allow for any detailed analysis of markets. The figures illustrate, however, that the great majority (76.5%) of international arrivals originated from Europe, with France, understandably, representing the biggest European market. Unfortunately, a breakdown of figures on the purpose of visit was not available, but it is likely than many tourists visited Seychelles on business or on holiday.

According to the *Vision 21* document, receipts from tourism increased from SR353 million in 1986 to about SR750 million in 1999 (US$143 million[*]). In that year, tourism was calculated to contribute about 29% of foreign exchange earnings for the country and about 20% of the GDP. These figures on amounts earned, however, only represent the direct contributions of tourism to the GDP, so the actual contribution of tourism to the national economy of Seychelles is much more significant. Approximately 5,000 people, or 17% of the economically active sector, were directly employed in tourism in 1999.

Vision 21 aims to increase tourist arrivals to approximately 180,000 by 2005 and to around 200,000 by 2010, as well as increase average tourist spend. It is recognised that this will involve *inter alia* improving and extending international air access to more foreign tourist markets, increasing the capacity and frequency of air services to cope with future demands and improving airport infrastructure. Focus will also be directed at upgrading existing facilities and services where necessary, developing new facilities and services of high quality and encouraging the development of small and medium size accommodation establishments that are compatible with the local environmental character and expanding and improving upon training. In addition, an attempt will be made to develop and promote a more diversified tourism industry, expanding more into adventure tourism and eco-tourism.

3.10.2 SUMMARY OF NRBCT INITIATIVES

[*] Approximate exchange rate of SR5.25 per US dollar.

At present, there appears to be no NRBCT initiatives in Seychelles, with one possible exception mentioned below.

The *Vision 21* document contains a chapter on "Promoting Eco-Tourism and Community Benefits". It recognises that eco-tourism is the fastest growing segment of the global travel industry and, with the wide international appreciation of Seychelles' natural environment, believes that the eco-tourism market will become of increasingly greater importance to Seychelles in the future.

The approach that has been adopted in *Vision 21* with regards eco-tourism, is to develop a more nature-based form of tourism that is environmentally sensitive and sustainable (ie. eco-tourism) on the islands of Mahe and Praslin and some of the other minor islands. This, though, is not necessarily synonymous with NRBCT. *Vision 21* recognises, however, that, where possible, local communities should be involved in owning and operating eco-tourism facilities and services and receive direct benefits from eco-tourism. This is certainly closer to the concept of NRBCT. The intention of the tourism authorities in Seychelles is to develop a detailed eco-tourism development strategy for the country and initiate a few pilot projects that are undertaken as prototypes. Lessons learnt from good examples of eco-tourism operations elsewhere in the world will be reviewed and taken into account and adopted where appropriate to suit the Seychelles.

In developing an 'eco-tourism development strategy', however, it is hoped that NRBCT, as a specific form of eco-tourism, will be taken into serious consideration.

3.11 South Africa

[Still in draft form]

3.11.1 Brief Overview of Tourism Industry

3.11.2 Key Characteristics of NRBCT

3.11.3 Summary of NRBCT Operations and Initiatives

3.11.4 Strengths and Weaknesses of NRBCT

3.11.5 Principal NRBCT Marketing Issues Noted

3.12 Swaziland

[Needs further input]

3.12.1 Brief Overview of Tourism Industry

Swaziland is a small, landlocked kingdom with a population of around 1million. With South Africa on three sides and Mozambique on the east, it is directly on the routes from RSA into Maputo and also those from Durban to the north of RSA, especially Kruger National Park. Its main attractions as a tourism destination lie in its mountainous topography and cultural traditions. Transport and communications are quite well developed, and Mbabane, the capital, is a modern city with all the facilities one would expect from a town its size

There is only one community based tourism product in Swaziland at present. This is Shewula Mountain Camp in the north-east of the country in the Lubombo Mountains, close to the Mozambique border, within the Shewula Nature Reserve.

The tourist industry in Swaziland is in a state of flux, with the profile of the tourist changing. In many ways, this was brought about by the end of the war in Mozambique and the Spatial Development Initiatives introduced by the South African government. Recent floods in Mozambique and the damage to many roads have also put an end to overlanders. Backpackers are now a major element within Swazi tourism.

In terms of the development of the tourism industry in Swaziland, the European Union is in the process of assisting the government in this area.

3.12.2 KEY CHARACTERISTICS OF NRBCT

3.12.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

3.12.4 STRENGTHS AND WEAKNESSES OF NRBCT

3.12.5 PRINCIPAL NRBCT MARKETING ISSUES NOTED

3.13 Tanzania

3.13.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

Tanzania tourist industry has three main geographic focal points:
1) the protected areas in the north of the country located around the town of Arusha;
2) the coastal areas including Kilwa, Dar-es-Salaam and Tanga on the mainland and Zanzibar; and
3) the protected areas in the south, centred around the Selous Game Reserve.

The attractions are a great diversity and abundance of wildlife populations in highly scenic national parks, game reserves and marine reserves several of which are world heritage sites; renowned archaeological and historical sites and highly diverse cultures in a peaceful country. The primary forms of tourism are:
1) photographic safaris to the parks;
2) consumptive wildlife-based tourism in game reserves;
3) beach tourism on the coast; and
4) cultural tourism around the focal points mentioned above.

The 1999 figures for Tanzania show arrivals to be 627,325 this was the pinnacle of ten years of almost continuous growth in number of international visitors to Tanzania from an initial figure of . The figures for the year 2000, however, show a downturn of 20% to a total of 501,669 visitors. The table below presents the number of international visitors to Tanzania during 2000, together with their region of origin.

Arrivals in Tanzania by region for the year 2000

Region of Origin	No. of visitors	% of Total
AFRICA	**209,934**	**41.8**
Eastern Africa	172,097	82.0
Middle Africa*	9,335	4.4
Northern Africa**	362	0.2

* WTO defines Middle Africa as including the countries of Chad, Central African Republic, Cameroons, Gabon, Congo Brazzaville, Democratic Republic of Congo and Angola
** WTO defines Northern Africa as including the countries of Sudan, Algeria, Morocco and Spanish Sahara. Both Libya and Egypt are, perhaps surprisingly, included under WTO's definition of the Middle East.

Region of Origin	No. of visitors	% of Total
Southern Africa	18,466	8.8
West Africa[***]	9,674	4.6
EUROPE	**153,958**	**30.7**
Central & Eastern Europe	1,885	1.2
Northern Europe	75,527	49.1
Southern Europe	15,991	10.4
Western Europe	58,841	38.2
Eastern Europe & Mediterranean	1,714	1.1
AMERICAS	**49,513**	**9.9**
Caribbean	2,144	4.3
Central America	53	0.1
North America	42,899	86.7
South America	4,417	8.9
EAST ASIA & PACIFIC	**38,299**	**7.6**
North-east Asia	14,874	38.8
South-east Asia	6,931	18.1
Australasia & Melanesia	16,494	43.1
SOUTH ASIA	**22,626**	**4.5**
MIDDLE EAST	**27,339**	**5.5**
TOTALS	***501,669***	***100.0***

Source: Tanzania Ministry of Natural Resources and Tourism, Tourism Department data from Immigration

As can be seen, more than forty percent of visitor arrivals come from Africa. As could be expected, the great majority (82%) originate from East Africa, with Kenya being the largest contributor (almost 49% for the region).

Europe is the second largest market, representing 30.7% of total visitor numbers, with Northern Europe (which includes the UK) being the largest source market. The great majority of American visitors (33,060 or 70.8% of the total) come from USA. Of the East Asian and Pacific region, Australasia is the largest market, shared equally between Australia and New Zealand.

Figures for the purpose of visit are give below:

Purpose of visit to Tanzania for the year 2000

Purpose of Visit	No. of Visitors	% of Total Visitors
Holiday, recreation	339,596	67.6
Business	130.201	26.0
Transit	10,956	2.2
Other	20,916	4.2
TOTALS	***501,669***	***100.0***

Source: Tanzania Ministry of Natural Resources and Tourism, Tourism Department data from Immigration

Regrettably, there are no figures for VFRs, which are presumably included under ‘holiday and recreation’. Such figures would certainly help to separate bona fide tourists visiting Tanzania on holiday from those simply returning home to visit friends and relatives.

The principal government and private sector institutions involved in tourism in Tanzania are as follows:

- Ministry of Natural Resources and Tourism, under which are found the separate Tourism Department and Wildlife Department

[***] WTO defines West Africa as including all those countries including and occurring to the west of Nigeria and Burkino Faso, with the exception of “Northern African” countries.

- Tanzania Tourist Board (TTB);
- Tanzania National Parks (TANAPA);
- Tanzania Cultural Tourism Office (TACTO); and
- various private sector associations;

3.13.2 KEY CHARACTERISTICS OF NRBCT

Throughout the 1980s and 90s, there has been increasing involvement of communities adjacent to protected areas in the management decisions of the national parks and game reserves in Tanzania. This has largely been through the development of formal and informal arrangements between park authorities and community organisations. More recently, various NGOs and government departments, particularly those in the Ministry of Natural Resources and Tourism, have, with assistance from international donors and NGOs (eg. AWF, GTZ, IUCN, Irish Development Fund, SNV), spearheaded programs to assist communities to develop tourism in their areas.

Three of the more important developments have been the:
1) growth of community cultural tourism;
2) provision of hunting rights to communities in Wildlife Management Areas, with a proposal for commercial hunting rights also to be granted; and
3) the development of community marine coastal tourism.

Community tourism is presently well established in four provinces within Tanzania, namely, Arusha, Tanga, Mbeya, Dar-es-Salaam and Zanzibar[1]. NRBCT is also being developed in Kilwa and on Mafia Island.

A national community conservation office, called the Tanzania Community Tourism Office (TACTO), was established in Arusha in 2000 to assist its members with their tourism operations.

There are <u>eight</u> types of NRBCT in Tanzania.

Guided tours on foot or by bike, camel, car or in a dhows or canoes to a marvelous mix of sites and activities: farm walks, cultural tours, historical tours

Snorkling in coral reefs, with turtles, dolphin viewing, sunset cruises and sport fishing.

Nature walking/hiking safaris through rainforests, along rivers and up to the tops of mountains, to scenic vistas, crater lakes, water falls and hot springs and to sacred sites; for bird-watching and game viewing.

Accommodations at basic campsites, in homestays with families, in chalets, cottages, lodges, the local mission, the school guest houses or with a community partners' upscale lodges.

Restaurants and catering of local and international dishes, visits to spice gardens and village kitchens.

Guided village walks to gain and insight into the culture, visit with elders, experience the hustle and bustle of village markets, cattle markets, to see craft-making centers (pottery, bead-making, baskets, wood-carving, black-smithying, traditional weapons); and into family *bomas* (compounds).

Guided farm walks to present day and historic sites of ancient agricultural systems and to spice gardens.

[1] There are community products in Zanzibar notably the tours of the Zanzibar Town and the spice tours but the team was unable to go to the island.

Guided community production walks to community businesses such as apiaries (bee-keeping), cheese factories, traditional breweries, brick-making and carpentry workshops, to an herbal garden and an herbal hospital.

This list of types of NRBCT is distinguished by the diversity of tourism products, ranging from mountain hikes to snorkelling along the coat's coral reefs, the canny packaging of the everyday village life, the central role that local guides play and by the absence of sales being conducted by communities of wildlife for hunting (cf. Botswana).

In Tanzania it is clear that many villages are trying to attract visitors on day-trips. The provision of overnight accommodation is not the priority and campsites are generally very rudimentary. Accommodation is normally offered at guesthouses run by individual entrepreneurs of at guesthouses operated by existing institutions, such as missions and schools.

All villages charge fees to visitors, with the money collected going into the village development fund. Each village association decides on the village project they wish to develop using viallge development funds. Many villages have already accomplished their initial development goals and are moving on to secondary or further goals. For example, the village of Longido have already built the cattle dip they wanted and are now working towards establishing a kindergarten school. All guides come from the villages on whose tourism operation they work. They all speak English and some speak other European languages. Some may have been involved in the initial product development and receive some training to be a professional guide. They all have a set of facts and stories to enrich the tourist's visit.

TACTO is presently working with 18 member communities. They all categorize their tourist operations as "cultural" tourism. All, however, include natural resources as a part of their tourist product. TACTO, with the assistance of SNV (a Dutch volunteer organization) has developed some basic marketing tools including brochures and a website (www.tanzaniatourism.com). The brochures are distributed to tourism information centres. TACTO also publishes a newsletter for its members.

3.13.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

In total, there are ***18 NRBCT operations*** in Tanzania. In very brief outline, these are as follows:

#	Name of Operation	Type of Products	Beneficiary Community
1	Babati / Hanang Cultural Tourism	Guided cultural hikes, homestays, traditional food, mountain climbing, canoeing	Babati & Hanang communities
2	Engaruka Cultural Tourism	Walking tours to ruins, fields, boma & cattle market, bird-watching walks	Engaruka village
3	Gezaulole Cultural Tourism	Village life walk, dhow & bicycle trips, homestays, campsite, local cuisine	Gezaulole village
4	Ilkiding'a Cultural Tourism	Guided tours of village, cultural hike, local food, craftpersons, farmers, market	Ilkiding'a village
5	Hasha Project-Msafiri	Cottages, campsite, tours to brick, beer & carpentry works, tours to herbal gardens & hospital, hike in mountains	Kisangara village
6	Longido Cultural Tourism Programme	Cultural and historical tours, bird watching, mountain hikes, walking safaris	Longido village

#	Name of Operation	Type of Products	Beneficiary Community
7	Machame Cultural Tourism	Camp site, home stays; guided tours to caves, forests, craft workshops, farm lands, trout rivers	Machame village
8	Sisi Kwa Sisi Society	Guided tours to crater lake, waterfalls, hot springs; guided mountain hikes; canoe trips	Mbeya community
9	Mkuru Cultural Tourism Programme	Camel safaris, bird watching, mountain hikes	Mkuru village
10	Monduli Juu Cultural Tourism Programme	Rain forest walk, walk to dam, bird watching, mountain hike, visit to Maasai meat camp & jewel factory	Emairete, Enguiki, Eluwai & Mfereji villages
11	Mto wa Mbu Cultural Tourism	Campsites, guest houses, cafes; guides for farms, development projects, lake & hill tours	Mto wa Mbu village
12	Mama Anna's Cheese Factory	Campsite; guided tours along rivers, on hills, farmland, community developments; local cuisine	Mulala community
13	Ng'iresi Cultural Tourism Programme	Campsite; guided tour on traditional herbal remedies; local cuisine	Ng'iresi & Olgilai villages
14	Pangani District Cultural Tourism Programme	Walking tours of old town & historical sites; sunset cruise; agricultural & nature walk; sport fishing; snorkelling with sea turtles; dolphin viewing; scuba diving	Pangani district
15	Northern Pare Mountains	Homestays, guest house, school rest house, campsite; guided mountain hikes; canoeing	Usangi community
16	Southern Pare Mountains	Lodge, campsites, home-stay; village tour, hikes & walking tours; local cuisine	Communities around Mbaga Hills
17	Friends of Usambara	3-5 day treks; guided walks in rain forest & on farm land; visits to cheese factory, Catholic mission, development projects, local crafts people, traditional healer; butterfly viewing	Lushoto village
18	Jukumu Society	Chalets, campsite; photographic safari	Kisahi village

In addition to the 18 NRBCT operations, all of which involve communities working with TACTO, there are ***two important NRBCT initiatives*** that are presently being developed.

The first is through the Department of Wildlife and with the assistance of the German development organization, GTZ. Communities in the buffer zone of the Selous Game Reserve in the south of Tanzania have already gained rights to the wildlife quota in their areas. This quota may be used for subsistence use, or be sold to citizen hunters. A proposal of the Department of Wildlife to give these communities the right to undertake commercial transaction with the wildlife quota is at present before government. If this proposal is accepted, then communities in Tanzania would be able benefit from the lucrative international hunting safari operations.

The second initiative is through the Marine Parks and Reserves and the National Environment Management Council, who are jointly assisting coastal communities along the coasts of Dar-es-Salaam, Mafia Island and Kilwa to develop their associations and partnerships with the private sector in order to participate more fully in the rapidly developing coastal tourist industry. It is worth noting that the Pangani community in Tanga Province advertises, not only its own products in its brochures, but also the names and contact information of all commercial lodges that use their guiding services. Clearly, the community realises that their income is related to the numbers of visitors staying at the lodges.

3.13.4 Strengths and Weaknesses of NRBCT

The notable ***strengths*** in NRBCT in Tanzania include the following:

- the team only managed to visit one village and found the product interesting and diverse, with welcoming villagers and a well-informed and articulate coordinator;
- NRBCT products in Tanzania are based on non-consumptive, culturally-rich rural life within scenic landscapes adjacent to protected areas. Thus, they benefit from tourists visiting the protected areas;
- most communities have a suite of products which are run by a variety of enterprises owned and run by individuals, groups and/or a whole community;
- a well-designed, user-friendly website for cultural tourism;
- an SNV-funded programme has given a significant push to the growth of community tourism by providing a framework for training and marketing;
- that marketing of NRBCT is facilitated by membership of a new NRBCT association namely, the Tanzanian Association of Community Tourism Operators who are well linked to the Tanzania Tourist Board; and
- the establishment of Village Development Funds (VDFs), to which tourism village fees are directed, the clear delineation of village development projects that will be supported from the VDFs and the publication in the TACTO Newsletter of stories on the use of the VDFs enhances transparency of operations – an essential aspect of any community-wide financial operation.

The more notable ***weaknesses*** in NRBCT in Tanzania include the following:

- division at government department level between communities working with non-consumptive (Tourism Department) and consumptive tourism (Wildlife Department) reduces the consumptive-based communities' opportunities for marketing by the TTB;
- It is unclear whether consumptive-based tourism communities are eligible for training and marketing through TACTO;
- community tourism will have limited benefit to communities away from the main tourist routes; and
- one community's brochure (Pangani) indicates links to commercial operators.

3.13.5 Principal NRBCT Marketing Issues Noted

There are three NRBCT marketing issues of note in Tanzania.

The role of the national tourist marketing board may be less well known than is advisable. This is especially true for those NRBCTs based on consumptive tourism.

Finding the TCT Website is not self-evident. As far as the team could tell only the words "Tanzania cultural tourism" readily accessed the website. Searching for the words "Tanzanian community tourism" for instance was not useful. This can be easily fixed.

All NRBCT needs to continue to address standards for food and hygiene. Most TCT community literature noted that campsites are basic. This will need attention over time.

3.14 Zambia

3.14.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

The tourism industry in Zambia is based largely on a few of the country's 19 national parks, 35 Game Management Areas (GMAs) and relatively widespread and abundant wildlife populations and on the attractions of the Zambian side of the Victoria Falls. Some cultural tourism is also found in the country, manifested mainly through the various crafts, craft stalls and some craft markets that are found in the main tourist centres and along tourist routes and a few colourful and vibrant cultural ceremonies.

The growth of tourism in Zambia has been and continues to be hampered by a combination of factors, including *inter alia* poor internal transport networks, poor communications, a collapse of and continued instability with the Kwacha, high inflation, high import tariffs, excessively high prices and profiteering, internal political instability, nearby conflicts and/or political instability (eg. Angola, Zimbabwe, DRC, Malawi), poor marketing of tourism, lack of coordinated tourism development and mismanagement and corruption within the wildlife sector – the latter representing the basic building block of much of the tourism industry in Zambia.

Despite these difficulties, however, Zambia's tourism industry has grown significantly in recent years. The latest tourist statistics available to the study for Zambia are for 1999. In that year, 456,000 visitors arrived in Zambia, representing a 26% increase in numbers on the previous year and an almost trebling in numbers since 1995, when 159,217 people visited the country. A breakdown of the available figures on international arrivals in Zambia is given below

Arrivals in Zambia by region for the year 1999

Region of Origin	No. of Visitors	% of Total
AFRICA	No overall figure available	n/a
South Africa	87,644	19.2
Other countries of Southern Africa	31,662	6.9
Zimbabwe	138,872	30.5
Tanzania	20,847	4.6
Kenya	3,320	0.7
Other countries of Eastern Africa	2,945	0.6
All countries of Middle Africa	31,952	7.0
Other countries of Africa	1,958	0.4
EUROPE	No overall figure available	n/a
UK	42,517	9.3
Germany	7,233	1.6
Scandinavia	7,178	1.6
France	4,979	1.1
Denmark	3,776	0.8
Sweden	3,580	0.8
Italy	1,820	0.4
AMERICAS	No overall figure available	n/a
USA	13,462	3.0
Canada	4,644	1.0
ASIA	No overall figure available	n/a
India	6,413	1.4
Japan	1,692	0.4
AUSTRALASIA & PACIFIC	No overall figure available	n/a
Australia	11,630	2.6

Region of Origin	No. of Visitors	% of Total
New Zealand	5,404	1.2
OTHER	22,472	4.9
TOTALS	***456,000***	***100.0***

Source: World Tourism Organisation (October 2000)

Regrettably, as before, the available WTO statistics for Zambia do not allow for any detailed analysis of markets. However, it can be seen that more than 30% of visitors to Zambia come from Zimbabwe, probably mostly relating to business, although cross-border tourist traffic will contribute quite significantly to the total. The next largest market is South Africa (19.2%), again made up of a mix of business people, tourists and probably some VFRs. The UK represents the biggest European market (9.3%), many of which will be VFRs and business people, while both the USA and Australia and New Zealand are significant markets, probably mostly *bona fide* holiday makers. Australasian tourists to Zambia are particularly attracted by the adventure tourism activities that Zambia, and neighbouring Zimbabwe, offers the Victoria Falls.

With regards wildlife-based tourism, which represents Zambia's largest tourism asset together with Victoria Falls, the country has several internationally-known game reserves (eg. the South Luangwa, Kafue and Lower Zambezi National Parks) and a particular niche of wildlife tourism product that Zambia seems to have cornered almost for itself – perhaps deservedly so. The products in question relate mainly to small, exclusive, up-market, low impact bush camps and lodges that offer walking safaris in big game areas as a major and very popular activity. This particular type of product seems to be in great demand and is characterised by a relatively high level of return business.

One major disadvantage that Zambia has with its non-consumptive wildlife-based tourism industry is the short tourist season in most national parks – only some five to six months long in most cases and linked directly to the onset of the rains and the subsequent lack of access. This means that most operations close down for six to seven months of the year but have to continue paying salaries and overheads for the whole year. Together with other factors, such as difficulties and high cost of communications and transport being just two, this means that overhead and operating costs in Zambia are high. Consequently, prices charged to guests are on the high side (sometimes exceeding US$400 per day, all inclusive) and can usually only be afforded by international visitors. With some, lodges and bush camps, more than 90%, and sometimes upwards of 97%, of guests are non-residents of Zambia. Overall, therefore, national parks in Zambia are largely inaccessible to the great majority of the country's population.

Another component of wildlife-based tourism in Zambia is the trophy or safari hunting industry. This consumptive industry, which represents by far the most important component of NRBCT in Zambia, is based on and operates within about two thirds of the country's game management areas. These GMAs are found grouped around most of the country's national parks and are intended to act as buffer zones between the core conservation areas in national parks and the surrounding agricultural land, settlements and communities. Hunting concessions for hunting blocks within the GMAs are put out to public tender, normally every five years. Successful bidders then enter into a written contract, or hunting concession agreement, with ZAWA, that grants them the exclusive right to hunt trophy animals on their concession area. Communities resident within the concession area then benefit from income that is generated. .

As with the photographic forms of wildlife tourism in Zambia, however, overheads and operating costs are high. Linked also to sometimes exorbitant hunting licence fees, competition with resident, citizen and special license hunting (the three of which require the payment of much reduced fees – an average discount of 92%, except in the case of special licences which are issued free), declining trophy standards (although good trophies can still be found), the severe effects on animal populations of commercial and subsistence poaching and encroachment by agriculture and settlement and a lack of strict controls within the industry (especially on the ground), the Zambian hunting industry is very close to becoming totally uncompetitive. The hunting industry and the type of hunting that Zambia offers is for the more experienced hunting client, with Tanzania being Zambia's closet competitor. In 1998, the Zambian trophy hunting industry generated estimated foreign earnings of between US$4 and 7 million, while Tanzania in the same year generated more than US$57 million.

Added to the poor competitiveness of trophy hunting in Zambia, despite the fact that Zambia offers some species not obtainable anywhere else in the world (eg. sitatunga, Kafue lechwe, black lechwe, all three of which are in great demand), the recent ban on hunting in the country has had an enormous impact on the safari hunting industry, not to mention NRBCT and community involvement in conservation and tourism in general. [This is discussed in more detail in **SECTIONS 3.14.2** and **3.14.3** that follow.]

According to the findings of a recent study (Timothy Mushibwe, personal comment), comparing the total land area under wildlife management in Zambia and two other countries with the return in US dollars per hectare is quite revealing. South Africa has between 11 and 11.5 million hectares of land under wildlife, generating an income of US$16.5 per ha, while Zimbabwe has 12 million hectares of land under wildlife, generating US$11.75 per ha. Zambia, however, has 16 million hectares of land under wildlife, but only generates US$0.68 per ha – between 17 and 24 times less per ha that either Zimbabwe or South Africa. The potential for developing and exploiting wildlife on that land in Zambia and generating a far greater return is very significant indeed.

Victoria Falls is undoubtedly a major tourist draw card for the SADC region, and in particular for both Zambia and Zimbabwe. In fact, it is such an attraction that some South African tour operators are marketing Victoria Falls as an added destination to their own packages simply to get visitors to come to South Africa, flying their guests up the Falls for a day or so and then returning to South Africa. Without having access to available suitable statistics, it is very likely that a significant portion of tourists visiting Zambia do so at the border crossing between Zimbabwe and Zambia just below the Victoria Falls. Certainly, up until the opening of the new Zambezi Sun Hotel, which has still to develop a real profile in the market place (largely because of the current problems in neighbouring Zimbabwe), most of these visitors crossed into Zambia as day-visitors, returning to Zimbabwe and their hotels after visiting the Zambian side of the Falls. It is likely that relatively few tourists carried on into Zambia to visit other destinations. Once the difficulties in Zimbabwe have been resolved, however, and tourists begin to return to that country and those countries adjacent to Zimbabwe, Victoria Falls is most likely to again become the premier tourist destination in the region.

In general, though, and taking into consideration the tourism resource base that the country has, Zambia most definitely has the potential for developing a major and significant tourism industry that is both very diverse in the types of product on offer and which could be developed and extended across much of the country. It is understood that this industry, if it were fully and properly developed, coordinated and managed, has the potential for generating foreign earnings of up to US$600 million per annum. [During 2000, the industry apparently earned a total of between US$10 and 11 million.] Linked to its' geographical location, surrounded as it is by no fewer than six SADC fellow-member countries, a large, vibrant and successful tourism industry in Zambia could have significant positive impact on the region's tourism industry as a whole.

The key government, non-government and private institutions involved in tourism in Zambia are as follows:

- Ministry of Tourism, head office in Lusaka;
- Zambia National Tourist Board (ZNTB), head office in Lusaka and branch offices in Livingstone, New York, London and Pretoria;

- Zambia Wildlife Authority (ZAWA), the newly-constituted state wildlife conservation organisation derived from the former National Parks and Wildlife Service (NPWS) and presently largely dysfunctional;
- Tourism Council of Zambia (TOAZ), a representative body of tourism product owners (eg. hotels, restaurants, game lodges, airlines, car hire companies, etc);
- Luangwa Safari Association (LSA), a private sector association of tourism product owners in the Luangwa Valley;
- Livingstone Tourism Association (LTA), a private sector association of product owners in the Livingstone area;
- Conservation Lower Zambezi (CLZ), a private sector association of product owners in the Lower Zambezi area concerned primarily with conservation of wildlife, rather than tourism *per se* (ie. there is no specific 'tourism association' for Lower Zambezi);
- Professional Hunters' Association of Zambia (PHAZA), a private sector association of professional hunters. There is no specific safari hunting operator association in Zambia;
- Hotel and Tourism Training Institute (HTTI), the largely state funded tourism training school that has received support in the past from Irish Aid and the EU; and
- National Heritage Conservation Commission (NHCC), responsible for national monuments and the country's many spectacular and scenic waterfalls.

Zambia does not have a national institution that handles community development issues. The closest one could get is ADMADE, the former NPWS programme for wildlife-based community development. The functions of ADMADE have now been absorbed into the new ZAWA. Regrettably, the community function is largely dysfunctional at the moment, due mainly to budgetary and resource constraints and the lack of skilled staff within ZAWA and the cessation of hunting in the country's GMAs.

3.14.2 KEY CHARACTERISTICS OF NRBCT

NRBCT in Zambia is normally linked almost entirely to trophy hunting operations that take place within the majority of the country's 35 GMAs. Other than the several hundred unskilled and relatively skilled jobs that have arisen from hunting (eg. tracking, skinning, client care, etc), benefits to communities are mainly in the form of annual payments made by ZAWA through the Wildlife Conservation Revolving Fund (WCRF). The payments are derived from hunting licence fees paid by safari hunting operators and are distributed according to the following formulae:

- 50% goes direct to the Government, through the Ministry of Finance;
- 12½ % is retained by ZAWA to help cover the management of national parks;
- 17½ % is paid out to the communities; and
- 20% is retained by the WCRF for reinvestment in the wildlife sector.

Figures for 2000 show that communities in Zambia received a total of US$ 700,000 from trophy hunting, whilst the Government received US$ 2 million. Communities do not receive income from the issue of resident hunting licences (issued to residents of Zambia), citizen hunting licences (issued to residents of respective GMAs) or from the issue of special licences (issued by the Minister of Tourism). Attempts to obtain more detailed information on hunting and the benefits accruing to communities were made on several occasions, but unfortunately information was not forthcoming.

Following a study conducted by consultants on the hunting industry in Zambia, during which it was found that certain aspects of hunting in Zambia were badly mismanaged and open to corruption. a 12-month Presidential ban was imposed on safari hunting in November 2000. This ban did not extend to resident, citizen or special licence holders and effectively only covered commercial safari hunting operations. Among the immediate consequences of the ban were that most Zambian-based safari outfits had to close down or move their operations to neighbouring countries, professional hunters found employment elsewhere in the region, skilled and unskilled jobs, especially in the rural areas, were lost and communities that previously relied quite heavily on income from trophy hunting lost an important revenue source. This has effectively meant that communities will receive no income from hunting for the year 2001 and subsequent years, or until the ban is possibly reviewed and lifted. Linked to this and the fact that communities are still owed K1.5 billion from 2000 hunting activities, that the resource user rights that that were granted to communities through the Zambia Wildlife Act No. 12 of 1998 have been compromised by the ban and that international confidence in Zambia's trophy hunting industry has been severely tarnished, the ban on trophy hunting will have an immediate and severe impact on the safari hunting industry and on NRBCT in Zambia. In addition, confidence amongst communities regarding wildlife utilisation and their relationship with ZAWA will be severely shaken, as will the efforts that have been made over the last 15 years in establishing a significant CBNRM component in Zambia through the ADMADE and Luangwa Integrated Rural Development Programme (LIRDP) CBNRM programmes.

In recent years, there have been several initiatives that have subsequently developed that are non-consumptive in nature. Nevertheless, non-consumptive NRBCT in Zambia is very much in the infancy stage and, should the ban on safari hunting be lifted, hunting is likely to remain the mainstay of NRBCT in the country for many years to come.

There are <u>seven</u> types of NRBCT in Zambia, one of which (trophy hunting) is not currently operating:

<u>Village visits</u>. A number of villages encourage tourists to visit, offering guided walks, food and drink, as well as dancing and music and, in some cases, the chance to stay overnight. One village has established a nearby cultural village at which tourists can stay. Strictly speaking, though, visits to such commercially oriented cultural villages are not really the same as visits to traditional, living and working villages.

<u>Village stays</u>. Some villages encourage visitors to stay overnight within the village itself, sleeping in traditional huts, eating traditional food and generally interacting with villagers during their day-to-day activities. There are only two such operations in Zambia, one of which (Kawaza Village Tourism Project) is probably amongst the most successful NRBCT operation in the region.

<u>Campsite</u>. Surprisingly, the concept of community campsites, as is practiced widely in Namibia for instance, does not seem to have caught on in Zambia and examples of community-run campsites are rare. The community campsite identified during the study has only the basic amenities available and appears to be a very *ad hoc* operation. It is likely that there are other examples in Zambia, but they would appear to be also somewhat off-the-cuff and informal, certainly not promoted and not particularly successful.

<u>Handicrafts</u>. Handicrafts are arguably the most visible form of NRBCT product in Zambia, being found in most of the main tourist centres and along tourist routes. The range of locally-made handicrafts is quite diverse, and includes woodcarvings (particularly common), stone carvings (especially malachite), basket work, jewellery, paintings, etc. In general, the quality of craft items produced is quite high. Zambia is also an important outlet for crafts produced in other countries if Africa, particularly to the north of the country (eg, Malawi, Tanzania, Kenya, several West Africans countries and, especially, neighbouring DRC). Very little material seems to come from countries to the south.

In Zambia, many crafts, especially woodcarvings, undergo two stages of development. They are firstly produced in rough form at the source of material, usually rural areas, and then passed on or sold in the urban or tourist centres where they are finished and sold to the tourist. In addition, crafts can be sold <u>either</u> by individuals at roadside stalls, <u>or</u> through a craft market within the community itself or nearby. In the great majority of cases with rural markets and roadside stalls, however, crafts are sold by individuals, usually the craftsperson himself/herself or an agent, with the income accruing directly to his/her family.

There are a number of craft markets in Zambia. The majority of these are in urban areas (eg. Kabwata Cultural Village and the monthly NGK craft market in Lusaka). There are perhaps only a couple of rural craft markets that are operated as a NRBCT enterprise, with most craft outlets being simple forms of small business.

National parks. One of the national parks in Zambia is run on behalf of ZAWA by a trust that was formed just over ten years ago. The Trust, which relies largely on donor funding, especially from Europe, develops and manages the park on behalf and for the benefit of the people of Zambia – as such, the park can be said to be a form of 'community tourism', the term 'community' being defined a little wider than normal. Over the past decade a range of tourism products have been built and established and these are on offer, for a price, to all visitors to the park.

Tourist camps. Similar to the trust just mentioned are two tourist camps in Zambia, one operating within a national park and the other just outside a park, that are owned and run (usually through a management company) by Zambia's principal wildlife conservation society. Anyone can stay at the camps, but members of the society, who a drawn from a broad cross-section of people within Zambia and beyond its borders, pay subscription fees to the society and, in return, receive discounts on accommodation at the society's camps. Again, the concept of community can be broadened to include such operations.

Trophy hunting. Trophy hunting in Zambia is normally conducted through the granting of hunting concessions to safari operators, usually for a period of five years, that allows them to hunt in 22 of the country's 34 GMAs. All the GMAs are located adjacent to national parks, which act as core conservation areas and principal breeding areas for game. The hunting concession agreement is entered into between the safari operator and ZAWA, with the relevant community being named as a beneficiary through revenue distribution. Hunting quotas are set by ZAWA on an annual basis and safari operators are required to achieve at least 75% of the annual quota, or face a financial penalty. Hunting licence fees are paid for in advance by the operator.

3.14.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

In total, there are ***8 NRBCT operations*** in Zambia. These are made up of:

- 2 x cultural villages offering overnight accommodation and other activities run by local communities, normally with the assistance of private sector operators;
- 1 x community campsite run entirely by a local community;
- 1 x 'village day-visitor' operation organised and run by a community association;
- 2 x tourist camps run by the Wildlife and Environment Conservation Society (WCSZ) of Zambia on a non-profit making basis for the benefit of all citizens of Zambia;
- 1 x national park developed and managed by a registered trust on behalf of ZAWA for the benefit of all citizens of Zambia;
- 1 x craft market, consisting of two sites and selling a variety of local and non-local crafts of a good to high standard, run by a community committee;

The 8 NRBCT operations, in very brief outline, are as follows:

#	Name of Operation	Type of Products	Beneficiary Community	Government/Private Sector Partner
1	Kasanka National Park	Chalets, camp-site, guided walks	Kasanka Trust Ltd & citizens of Zambia	Zambia Wildlife Authority
2	Muwele Cultural Village	Chalets, camp-site, dancing,	Chikuni community	WWF-Zambia Education Project

		fishing tours, crafts, initiation ceremonies		
3	Kawaza Village Tourism project	Village stay, day visits, guided walks, school visit, music, singing, dancing, drumming, story telling, sangoma, traditional food	Mwizala community & others	Robin Pope Safaris Ltd
4	Wildlife Camp, Mfuwe	Chalets, camp-site, bar, restaurant, game drives, crafts	Wildlife & Environmental Conservation Society of Zambia & citizens of Zambia	Lupande Safaris Ltd (management)
5	Wildlife Camp, Kafue National Park	Chalets, camp-site, game drives	Wildlife & Environmental Conservation Society of Zambia & citizens of Zambia	Not known as yet
6	Chiawa Camp Site	Campsite	Chiawa Tribal Authority	None
7	Mikuni Village	Guided walks, home visits, traditional food, dances, Lwiindi Ceremony, craft market (see below)	Lwiindi Cultural Association	None. Village relies on *ad hoc* visits by tour groups
8	Mikuni Craft Centre	Craft market (on two sites)	Mikuni Craft Centre Committee	None. Two sites rely on *ad hoc* visits by tour groups and passing trade.

A total of ***23 NRBCT initiatives*** are known in Zambia. Twenty-two of the initiatives consist of potential trophy hunting concessions that would be granted to commercial safari hunting concessionaires within the majority of the Game Management Areas in Zambia. A major beneficiary of these trophy hunting concessions are the communities living within the hunting areas, who normally receive 17½ % of the total money generated through the sale of hunting licence fees by the ZAWA, as well as a number of jobs. The hunting ban in Zambia means that, although all 22 concessions were operating last year, they are not presently doing so and no income from hunting will accrue to communities from this year's hunting season. Regrettably, therefore, they can only be considered as NRBCT initiatives. It is understood, however, that moves are underway to review the hunting ban and to re-launch trophy hunting in Zambia.

The other initiative known about is a community campsite in Lochinvar National Park, which it is hoped to re-launch in conjunction with the development of a private sector lodge within the park. The campsite was initially established by WWF-Zambia in the late-1980s and early-1980s, in conjunction with the local community and the former National Parks and Wildlife Service. However, the site always seems to have suffered from a number of problems, the principal one being the issue of landownership. It has effectively been non-operable for a number of years now, although it is being used as a training centre for scouts. The current initiative to redevelop the campsite, however, has been in the pipeline for a number of years and there seems to be no firm idea when the site will become operable again.

In addition to the above, there are likely to be a few more other NRBCT initiatives in Zambia.

3.14.4 STRENGTHS AND WEAKNESSES OF NRBCT

The notable ***strengths*** in NRBCT in Zambia include the following:

- the CBNRM programmes of both ADMADE and LIRDP have been in operation for approximately 15 years and gained extensive experience in working with communities and establishing working models of CBNRM. Unfortunately, both programmes can be described as "Zambia's best kept secret";
- the natural resource base for NRBCT is broad, abundant and in relatively good condition;
- the Zambia Wildlife Act No. 12 of 1998 bestows a degree of local community economic empowerment and allows for the future establishment of Community Resource Boards (CRB) to administer wildlife management in GMAs.

The more notable ***weaknesses*** in NRBCT in Zambia include the following:

- NRBCT is very largely based upon consumptive forms of tourism, ie. hunting. Any problems experienced with hunting (as illustrated by the current ban on hunting) will have rapid and severe implications for NRBCT operations and their linkages with and benefits to communities;
- the current ban on trophy hunting has effectively ended 22 NRBCT initiatives;
- The ADMADE programme, almost entirely reliant on hunting, is not suitable for areas in which wildlife populations are low or in decline;
- NRBCT that is dependant entirely on consumptive hunting may encourage overexploitation of wildlife resources in marginal wildlife areas;
- Unfavourable differential pricing structure for hunting licences and distribution of income leads to a skewing in market prices for animals and resentment amongst communities. Trophy hunting clients are expected to pay considerably higher fees for hunting a particular species of animal than resident hunters. [Resident hunters receive an average discount on hunting fees of 92% - a fact not lost on safari operators or their overseas clients] Furthermore, although communities receive a percentage of income generated through the sale of trophy or safari hunting licences (ostensibly 17½%), they receive nothing through the sale of resident hunting licences or the issuing of special licences. In many cases, communities would like to see resident and special licence hunting stopped in their areas in favour of continued income-generating trophy hunting from which they at least earn something;
- Monies due to communities from trophy hunting have not been distributed. This leads to resentment amongst communities towards the wildlife authorities and undermines support for CBNRM activities and initiatives;
- Developing non-consumptive forms of tourism in Zambia, even within the conventional private sector tourism sector, is not easy. It would be naïve to expect NRBCT to develop at any great pace, particularly when many communities have little awareness or understanding of non-consumptive tourism;
- Very little effort has been put into introducing non-consumptive tourism into NRBCT initiatives;
- Hunting provides more immediate benefits to communities than does non-consumptive tourism, meaning that introducing the latter will face a credibility problem;
- No Community Resource Boards are in place as yet, although some are fairly close to being established, meaning that no authority over the management of wildlife in GMAs has yet been transferred;
- Poor relations exist between ZAWA and many communities;
- The current moribund state of ZAWA is severely affecting wildlife conservation, CBNRM and NRBCT throughout the country.

3.14.5 PRINCIPAL NRBCT MARKETING ISSUES NOTED

With respect to NRBCT in Zambia, marketing of safari hunting in the country's GMAs is done almost entirely by individual trophy hunting companies. Very little, if any, input is required from communities. It is usual for safari operators to attend one or more of the safari hunting conventions around the world, the most important being the Safari Club International in the USA. It is at such conventions that many trophy hunts are sold to clients.

In discussions with both the Ministry of Tourism and ZNTB, it became apparent that NRBCT, as in some other countries visited, was a generally little understood sub-sector of tourism and one that was difficult to place within context of the tourism industry. Although product development is a marketing function of ZNTB, little seems attention seems to have been paid to NRBCT. Indeed, some of the NRBCT operations, such as Kawaza Village, are not even registered as tourism operators.

As mentioned above, perhaps the most successful NRBCT operation occurs in Zambia. With specific reference to marketing, the Kawaza Village Tourism Project has clearly demonstrated the importance and value of using a private sector tourism partner to successfully market NRBCT operations and products.

3.15 Zimbabwe

3.15.1 BRIEF OVERVIEW OF TOURISM INDUSTRY

Zimbabwe is one of the region's most popular tourist destinations. It is fortunate for Zimbabwe that one of the world's greatest natural attraction, the spectacular Victoria Falls, is situated on the country's north-western border with Zambia. In addition to variety of adventure tourism activities taking place around the Falls, such as bungee jumping, micro-lighting, abseiling and white-water rafting, the Zambezi River, including Lake Kariba, is also a major attraction, offering canoeing, boat cruises, houseboats, sport fishing, safaris, walking, etc. Zimbabwe also has a number of attractive national parks and protected areas, such as Hwange, Zambezi, Matobo Hills, Gonarezhou, Mana Pools, etc. These and others cover 11% of Zimbabwe's land area. There is also a proliferation of privately-owned game reserves. The Save Conservancy in south-eastern Zimbabwe, for instance, is one of the biggest privately-owned game reserves in the world. The 'big five' are prevalent almost throughout the country, but especially in the peripheral areas, and there are a number of conservation programmes for endangered species. Great Zimbabwe is another tourist attraction, giving visitors an indication of earlier civilisations that existed in the area. Mention must also be made of the enormous crafts industry in Zimbabwe, with good quality stone carving being a particular speciality.

The country's roads and communications structure is in good condition, although it is beginning to suffer from lack of maintenance and investment. Many of the tourism facilities are located in remote areas with limited development. However, most tourism operators maintain an office in Harare or other population centres. Hotels and lodges dominate the accommodation sector, but bed-&-breakfast facilities and campsites are becoming more common, especially in areas frequented by backpackers and hikers. A modern airport terminal has just been completed at Harare, and other international airports are situated at Bulawayo and Victoria Falls.

Prior to Independence in April 1980, international tourism was practically non-existent in the country due to the war and international economic sanctions against the then Rhodesian government. There was limited regional tourism. Following Independence, the tourism industry began its resurgence, but this was mainly concentrated in the hands of a few companies and individuals. Given the historic inward-looking approach to development in Zimbabwe, most of the tourism facilities were developer-driven, with little or no consideration being paid to what the tourist actually wanted. This limited the market available to Zimbabwe and no real effort was made to expand that market. There were also significant barriers to entry by local Zimbabweans into the industry, reducing them to competing in the lower end of the market.

Traditionally, the industry is dominated by the hotels and lodges sector, with Zimbabwe Sun (a division of Sun International) accounting for up to 60 % of bed/nights sold in the country. The locally-owned Rainbow Tourism Group is another significant player in the market, but they tend to compete directly against Zimbabwe Sun. Initially, the tourism sector concentrated on Victoria Falls, but with the expansion of National Parks and concern for the environment, other features were developed, particularly the hunting and photographic safari market.

Zimbabwe is still a primarily agricultural country, with 75% of the population living in rural areas. Tourism is still the fourth largest industry in Zimbabwe in GDP terms and is considered one of the prime areas where income can augment rural farming and subsistence level incomes. Tourism is not to be considered a substitute to any other form of income, but an addition to the economic options available to the populace. The country is blessed with many natural resources, of which its scenic beauty, fauna and flora are just a few. In common with most of the indigenous peoples of southern Africa, Zimbabweans are a naturally friendly and helpful people. Government, rightly so, regards the people as part of the rich tourism resource.

Unfortunately, recent political disturbances and their coverage in the international press have resulted in a dramatic downturn in tourism numbers to Zimbabwe. Tourism development has almost stopped and many hotels have dramatically scaled down their operations, with some closing altogether. Tourism as an industry is particularly sensitive to any negative publicity. While the tourist is, in reality, as safe in Zimbabwe as in any other major tourist destination, the need for a feeling of security is causing potential tourist to choose other destinations. In addition, the shortage of fuel is resulting in further difficulties for the tourist.

From a macro-economic position, the Zimbabwean economy is in a perilous state and state investment in tourism is severely constrained. Private sector investment is down by 61% in 2000 over 1999 and is marked by considerable uncertainty, reflected in the high number of closures and retrenchments. When compared with, for example, the recent and substantial investment in Livingstone on the Zambian side of Victoria Falls, a concerted effort will be required to recover lost ground. A new Millennium Economic Recovery Program has been prepared by the Ministry of Environment and Tourism, but this recognises that, without a correction of the economic imbalances and mismanagement, this Plan itself might need to be put on hold as it cannot succeed in isolation. The Plan also suffers from a complete lack of any financial costings, or any indication of where the reinvestment to kick-start the industry will come from. It appears the private sector will be asked to provide all funding, which is not really a viable option. Further, the nation's tourism marketing agency, the Zimbabwe Tourism Authority, depends on levies from tourism for its financing. As tourist numbers are considerably reduced, so too are the levies. As a result, ZTA is not in a position to effectively carry out its mandate.

The most recent statistics on visitor arrivals to Zimbabwe available to the study are the WTO's figures for 1998, taken from the WTO publication, *Tourism Market Trends: Africa – 2000.*

<u>Arrivals in Zimbabwe by region for the year 1998</u>

Region of Origin	No. of Visitors	% of Total
AFRICA	**1,583,343**	**75.7**
South Africa	718,832	34.4
Zambia	567,754	27.2
Mozambique	213,187	10.2
Other countries of Eastern Africa	25,013	1.2
Other countries of Africa	58,557	2.8
EUROPE	**305,490**	**14.6**
UK & Ireland	130,155	6.2
Germany	65,733	3.1

Region of Origin	No. of Visitors	% of Total
Switzerland	28,091	1.3
Netherlands	27,749	1.3
Other countries of Europe	53,762	2.6
AMERICAS	**121,104**	**5.8**
USA & Canada	97,325	4.7
Other countries of the Americas	23,779	1.1
ASIA	**36,990**	**1.8**
OCEANIA	**43,480**	**2.1**
OTHER	no data	—
TOTALS	***2,090,407***	***100.0***

Source: World Tourism Organisation (October 2000)

More than three-quarters of the international arrivals were from African countries, with South Africa contributing almost half of the African total and more than a third of the world total. In the absence of more detailed figures, it is likely that South Africans were visiting Zimbabwe on business, on holiday and as VFRs. Zambia accounted for more than 27% of the total visitors, presumably made up mostly of VFRs. Of the non-African regions of the world, Europe contributed only 14.6% of international arrivals, with the UK & Ireland being the principal source markets, making up 43% of European visitors. The Americas contributed less than 6%, with the great majority of arrivals coming from the USA and Canada.

Despite the seemingly low percentages, the actual numbers of international visitors received were relatively high compared with neighbouring countries. However, the relatively large number of South African visitors compared with the low numbers of non-African visitors seems to suggest that the tourist product on offer in Zimbabwe is more attractive to the South African market. Bearing in mind that the tourism industry in Zimbabwe has developed primarily to cater for its own domestic tourists, as is the case in South Africa, this seems likely to be the case. The figures therefore show that the tourism product in Zimbabwe has not developed or diversified enough to cater for the different demands of non-southern African tourists.

The year 2000 witnessed dramatic falls in tourism numbers from the highs of 1999, with the major markets of Britain and Ireland falling by 23% and Germany by 50%. 2001 is likely to see further declines. Thirteen international airlines have withdrawn from Zimbabwe in recent years, with a 55% decrease in air traffic to the country. The lack of fuel has provided a strong disincentive for regional visitors. Feeder and support industries have also suffered as a result of the crisis. Hotel occupancy rates are down from 60% in 1999 to 35% in 2000. To compound these difficulties, the mix of international and regional travellers is also down in relation to the domestic traveller – from 50:50 in 1999 to around 25:75 in 2000. As, traditionally, domestic travellers pay only 20% of international rates, this drop in international visitors represents a marked reduction in foreign earnings and profit margins. Though official figures indicate that tourist numbers in 2000 were approximately 1.6 million, tourist industry sources believe the real tourist figures are closer to 250,000 visitors.

It is true to say, however, that not all the difficulties are directly the result of the political and security situation in Zimbabwe. As early as 1997, it was apparent that the market was already reacting unfavourably to the lack of product development. Over the past few years, the average length of stay in Zimbabwe has dropped to one quarter that of South Africa, which has similar source markets. It is fair to say that management skills and capacity are a problem, particularly with regard to niche markets like community tourism and NRBCT. Marketing has not in the past been afforded the importance it deserves, with more emphasis being placed on just selling what was available rather than developing newer and better products. The quality and standards of service are often quite high in the upper end of the market, but most training is carried out in-house by the larger hotel and safari chains. Facilities for staff training on a national basis outside the main chains are scarce and poorly run.

Tourism comes under the aegis of the Ministry of Environment and Tourism, formerly the Ministry for Mines, Environment and Tourism. The Ministry is also the primary regulatory body, with responsibility for forestry conservation, national parks and wildlife conservation and environmental issues relating to natural resources. New environmental regulatory legislation is currently being drafted that will strengthen the conservation measures available to government. In addition, the Department of National Parks and Wildlife Management is to be restructured as a semi-autonomous board, reporting directly to the Minister of Environment and Tourism.

Among the key government, non-government and private institutions involved in tourism in Zimbabwe are the following:

- Ministry of Environment and Tourism;
- Department of National Parks and Wildlife Management, a division of the above Ministry;
- Zimbabwe Tourism Authority;
- Zimbabwe Council for Tourism;
- Zimbabwe Hunters and Guides Association;
- Zimbabwe Professional Hunters Association;

3.15.2 KEY CHARACTERISTICS OF NRBCT

Practically all NRBCT products in Zimbabwe come under the auspices of the Communal Areas Management Programme for Indigenous Resources (CAMPFIRE). Conceived in 1982 by the country's Department of National Parks and Wildlife Management, it was incorporated into the National Conservation Strategy in 1985. USAID agreed to fund the program under Natural Resources Management (Phase 1). The aim of this phase was to develop the human and institutional capacity to run the programme at Rural District Council (RDC) and local community level. Phase 2 was later launched to focus on infrastructural development. The overall objectives of CAMPFIRE were to:

- achieve sustainable management of resources by placing the custodianship and responsibility with the resident communities;
- allow communities to benefit directly from the exploitation of natural resources within the communal areas; and
- to establish the administrative and institutional structures necessary for the success of the program.

Local government in Zimbabwe is administered through Rural District Councils (RDCs). Twenty-one of these RDCs, which are located primarily around the periphery of Zimbabwe, fall into the CAMPFIRE Programme. These 21 districts are in turn divided into 38 Concession Areas in which sport hunting can take place. These districts and concession areas are as follows:

District	Concession Area
BEITBRIDGE	Area 1
BINGA	Songo & Siabuwa Lusulu Manjolo West Devil's Gorge
BUBI	Area 1
BULILIMAMANGWE	Maitengwe
CHIPINGE	Area 1
CHIREDZI	Naivasha/Malipati Sengwe Chitsa Chibwedziva
GOKWE NORTH	Area 1 Eastern Area
GOKWE SOUTH	Cheziya

District	Concession Area
HURUNGWE	Mkwichi Rengwe Nyaodza
HWANGE	Area 1 Stateland
KUSILI	Area 1
MATOBO	Area 1
MUDZI	Nyatana
MUZARABANI	Area 1
NKAYI	Area 1
NYAMINYAMI	Area 1 – Omay Area 2 – Omay Gache Gache Kanyati
TSHOLOTSHO	North

GONAKUDZINGWA	Area 1 Area 2	 ZIVAGWE	South Area 1
GWANDA	Thuli/Shashe		
GURUVE	North South East		

The NRBCT operations and products on offer by the communities include most aspects of both consumptive and non-consumptive tourism, but it is heavily dominated by the hunting sector. This is because the income from hunting far exceeds that from other areas and involves far less effort on the part of the RDCs in developing products and infrastructure. Also, hunting forms an important part of the country's wildlife management program. Responding to the increased demand from major source markets for community-based eco-tourism products, many tour operators have included visits to local villages as part of their holiday itinerary or safari.

In general, NRBCT has had a positive socio-economic impact in Zimbabwe. This is seen in the reduction in destructive practices, such as illegal mining, gold panning and poaching. Incidents of wildlife poaching have dropped significantly in all CAMPFIRE districts. Communities now see the long-term benefits of environmental protection and sustainable wildlife utilisation. Some community-run operations are beginning to earn profits, though, at this point and without infrastructural development, these profits will remain marginal. In common with NRBCT operations throughout the region, community-run ventures suffer from a lack of capacity, both in terms of management and resources.

NRBCT operations run by private sector tour operators and located in communal lands with access to national parks tend to be much more viable enterprises. Unlike community-run operations, private sector staff are generally more focused and motivated and possess the necessary management and marketing skills with a sound financial base. Consequently, these joint operations tend to be more sustainable in the long-term. In some instances, tour operators are committed to capacity building within the community in order to enhance the operation and product itself, further adding to sustainability. Employment opportunities for the community have been created through the demand for guides and service staff, and craft workers have gained another outlet for their products.

A breakdown of income earned in 1999 by RDCs participating in CAMPFIRE and where that income was allocated is given below.

Allocation of revenue for CAMPFIRE Programme for 1999

District	1999 Total Income		Amount (US$) disbursed to:				
	(US$)*	% of Total	Communities	Wildlife Management	Council Levy	Other	Unallocated
Beitbridge	57,740	2.1	31,461	18,298	7,842	0	140
Binga	301,580	11.0	172,409	0	0	0	129,171
Bulilimamangwe	53,285	1.9	23,786	23,599	5,900	0	0
Chipinge	56,951	2.0	24,231	9,337	8,911	11,664	2,808
Chiredzi	269,379	9.8	140,447	80,005	3,958	0	44,968
Gokwe North	283,530	10.3	50,018	29,979	48,003	0	155,530
Gokwe South	5,719	0.2	0	0	0	0	5,719
Guruve	489,872	17.8	231,572	144,256	91,737	0	22,308
Gwanda	0	0	0	0	0	0	0
Hurungwe	137,234	5.0	83,784	27,013	15,745	9,726	966
Hwange	159,713	5.8	66,193	43,048	18,449	861	31,162
Matobo	6,981	0.2	0	0	0	0	6,981
Mudzi	5,919	0.2	1,784	382	382	0	3,370
Muzarabeni	23,935	0.9	13,511	12,065	678	4,859	(7,178)
Nyaminyami	772,731	28.1	459,370	220,696	51,646	2,367	38,663
Rushinga	0	0	0	0	0	0	0
Tsholotsho	124,530	4.5	43,288	0	0	0	81,242

UMP	4,859	0.2	783	3,161	235	0	681
TOTALS	***2,753,958***	***100.0***	***1,342,635***	***611,830***	***253,487***	***29,477***	***516,520***

* - Exchange rate used at the time was Zm$ 38.3 per US$ 1

As can be seen, slightly more than US$ 2.75 million was earned by 18 RDCs during the year, with three RDCs, namely Nyaminyami, Guruve and Binga, between them generating 56.9% of the total.

Of the total earned revenue generated, 48.7% was allocated to communities, 22.2% went to support wildlife management activities, 9.2%went to the RDCs in the form of district levies, 1.1% was allocated to 'other' and 18.8% remained unallocated and was lodged in the CAMPFIRE accounts administered by the relevant RDCs, presumably for allocation at a later date.

Analysing the income further, the table below gives a breakdown of the income that was generated from five categories of activities undertaken in each of the RDCs. [Percentages given relate to individual RDCs (rows), rather than all the RDCs taken together (columns).]

<u>Analysis of income by activity for 1999</u>

District	Total (US$)	Income by Activity (US$)									
		Sport Hunting		Tourism		PAC, Hides & Ivory		Ivory Auction		Other	
		US$	%	US$	%	US$	%	US$	%	US$	%
Beitbridge	57,740	52,279	*90.5*	0	*0*	0	*0*	5,461	*9.5*	0	*0*
Binga	301,580	142,718	*47.3*	0	*0*	23,434	*7.8*	135,428	*44.9*	0	*0*
Bulilimamangwe	53,285	53,285	*100.0*	0	*0*	0	*0*	0	*0*	0	*0*
Chipinge	56,951	26,487	*46.5*	19,647	*34.5*	0	*0*	10,817	*19.0*	0	*0*
Chiredzi	269,379	210,541	*78.2*	0	*0*	7,062	*2.6*	50,989	*18.9*	787	*0.3*
Gokwe North	283,530	102,504	*36.2*	0	*0*	73,938	*26.1*	107,089	*37.8*	0	*0*
Gokwe South	5,719	0	*0*	0	*0*	0	*0*	5,719	*100.0*	0	*0*
Guruve	489,872	434,092	*88.6*	0	*0*	0	*0*	55,780	*11.4*	0	*0*
Gwanda	0	0	-	0	-	0	-	0	-	0	-
Hurungwe	137,234	104,413	*76.1*	554	*0.4*	0	*0*	32,267	*23.5*	0	*0*
Hwange	159,713	84,069	*52.6*	14,287	*9.0*	11,023	*6.9*	41,544	*26.0*	8,790	*5.5*
Matobo	6,981	0	*0*	0	*0*	0	*0*	6,981	*100.0*	0	*0*
Mudzi	5,919	2,034	*34.4*	0	*0*	515	*8.7*	3,370	*56.9*	0	*0*
Muzarabeni	23,935	8,874	*37.5*	0	*0*	4,410	*18.4*	9,546	*39.9*	1,005	*4.2*
Nyaminyami	772,731	630,559	*81.6*	44,220	*5.7*	30,811	*4.0*	63,281	*8.2*	3,860	*0.5*
Rushinga	0	0	-	0	-	0	-	0	-	0	-
Tsholotsho	124,530	88,411	*71.0*	0	*0*	0	*0*	36,119	*29.0*	0	*0*
UMP	4,859	0	*0*	0	*0*	0	*0*	4,859	*100.0*	0	*0*
TOTALS	***2,753,958***	***1,940,366***	**70.4**	***78,709***	**2.9**	***151,192***	**5.5**	***569,248***	**20.7**	***14,442***	**0.5**

* - Exchange rate used at the time was Zm$ 38.3 per US$ 1

It can be clearly see that, on average, more than 70% of income earned came from sport hunting, with the ivory auction (which took place during that year) generating almost 21% of the total. Significantly, tourism, ostensibly in the form of non-consumptive NRBCT, contributed less than 3% of the total generated. Non-consumptive NRBCT is practised in only four of the RDCs, namely Nyaminyami, Chipinge, Hwange and, to a much lesser extent, Hurungwe. The NRBCT ventures operating in these RDCs are detailed below.

What is clear from the figures, however, is that if the relatively paltry amounts earned by non-consumptive NRBCT in 1999 are contrasted with the very real potential on the ground for developing such forms of NRBCT in Zimbabwe, then it is obvious that NRBCT in its entirety can be developed and expanded considerably in the coming years. In actual fact, it does seem as though the potential and development of non-consumptive forms of NRBCT in Zimbabwe have been actively discouraged (in favour of sport hunting), or, at the very least, benignly ignored.

3.15.3 SUMMARY OF NRBCT OPERATIONS AND INITIATIVES

In total, there are ***21 NRBCT operations*** in Zimbabwe. It is probable, however, that others exist. Information that has been provided by authorities in Zimbabwe is somewhat ambiguous in some areas, requiring a fair amount of interpretation. This means, unfortunately, that some of the information in the NRBCT Directory is likely to be inaccurate.

Those NRBCT operations that have been identified are made up of:

- 2 x upmarket private sector game lodges situated on communal land. Some equity within the company is owned by the local community, while the lodge operators themselves pay rentals and/or bednight levies to the communities through the local RDC;
- 3 x low to mid-market camps & campsites run by local RDCs or community committees and offering a range of non-consumptive tourism products and activities, as well as, in two cases, sport hunting;
- 1 x ecotourism activity centre offering a range of non-consumptive tourism activities;
- 15 x sport hunting concessions, whereby the local RDC and one or more private sector hunting companies enter into an agreement whereby the safari company is permitted to hunt wildlife on communal land in return for payment of fees to the relevant RDC. The RDC acts as a collection agent, distributing funds to amongst others local communities, the wildlife management agency and itself.

The 21 NRBCT operations, in very brief outline, are as follows:

#	Name of Operation	Type of Products	Beneficiary Community
1	Sanyati Bridge Camp	Camp, campsite; sport hunting; walking, fishing, bird watching; village visits, traditional healers	Hurungwe Distict
2	Mavuradonha Wilderness Area	Campsites; walking safaris, hiking; horse riding; sport hunting	Mavuradonha community, Muzarabani District
3	Sunungukayi Camp	Camp; sport hunting	Uzumba Maramba Pfungwe (UMP) Zvataida communities & District
4	Kairezi Ecotourism Centre	Trout fishing; boating, canoeing, swimming; mountain hiking & climbing	Nyanga District
5	Chilo Gorge Lodge	Lodge; game viewing, bird watching; Shangaan cultural village tours; boat tours on Save River; visits to Chilojo Cliffs	Chipinge District
6	Mahenye Safari Lodge	Lodge; game viewing, bird watching; Shangaan cultural village tours; boat tours on Save River; visits to Chilojo Cliffs	Chipinge District
7	Beitbridge RDC	Sport hunting	Beitbridge District
8	Binga RDC	Sport hunting	Binga District
9	Bulilimamangwe RDC	Sport hunting	Bulilimamangwe District
10	Chipinge RDC	Sport hunting	Chipinge District
11	Chiredzi RDC	Sport hunting	Chiredzi District
12	Gokwe North RDC	Sport hunting	Gokwe North District
13	Gokwe South RDC	Sport hunting	Gokwe South District
14	Guruve RDC	Sport hunting	Guruve District
15	Hurungwe RDC	Sport hunting	Hurungwe District
16	Hwange RDC	Sport hunting	Hwange District
17	Gwanda RDC	Sport hunting	Gwanda District

18	Matobo RDC	Sport hunting	Matobo District
19	Muzarabani RDC	Sport hunting	Muzarabani District
20	Nyaminyami RDC	Sport hunting	Nyaminyami District
21	Tsholotsho RDC	Sport hunting	Tsholotsho District

It is likely that there are several NRBCT initiatives also under way in Zimbabwe, but unfortunately no information on them was obtained. What is certain, however, is that the potential for expanding NRBCT into the non-consumptive forms of tourism is largely unrealised. With the foundation that CAMPFIRE has provided for Zimbabwe and the experience gained, development of this sub-sector should proceed with relative ease.

3.15.4 Strengths and Weaknesses of NRBCT

NRBCT in Zimbabwe is dominated by CAMPFIRE, with little if any community tourism outside this framework. Central government devolved the responsibility for natural resource management to the RDCs, designating them the "appropriate authority". It was the intention of the CAMPFIRE program that the management of natural resources in community areas would be devolved to the local communities themselves, on the premise that the unit of utilisation should also be the unit of management and responsibility. This intention is perhaps one of the most important tenets of the CAMPFIRE

While the concept was good from the outset, difficulties within CAMPFIRE have stemmed from the lack of clear indication within the plan as to how this devolution from government to communities was to be carried out. The RDCs then made little or no effort to further devolve powers to local communities, continually citing lack of capacity within the local communities to run the program as the reason. Unfortunately, this sent a message to communities of a patronising central government which largely perceived communities as being incapable of decision making and management and which intended to retain central control.

RDCs tended to further abuse their position by:

- dictating management and benefit decisions to wards and villages;
- entering into contracts with tour operators without any consultation with the producer communities;
- withholding feedback to producer communities on RDC discussions on CAMPFIRE issues;
- having CAMPFIRE officers living too far away from the producer communities to be able to attend to urgent matters, such as problem animal control;
- ensuring that game guards and scouts were answerable to councils rather than to the producer communities;
- delaying payments of the proceeds from wildlife to producer communities; and
- retaining interest earned from CAMPFIRE fund accounts rather than passing interest onto producer communities.

While recognising that these fairly major shortcomings of the CAMPFIRE program exist, it would be completely wrong to suggest that CAMPFIRE has been a failure. As stated above, the concept was and still is good, but the resulting failures were a consequence of inadequate planning, short-sightedness and political interference. There was no mechanism within the original plan to ensure the devolution of powers to manage the resources to the local communities and, perhaps more importantly, there was no political will to do so. Whereas donor funds were made available for capacity building within the communities and that extensive training within communities was undertaken, RDCs have always been reluctant to cede any control or influence to the producer communities, preferring to foster a culture of dependency on officials among those communities. RDCs are also very reluctant to lose a lucrative source of income and interest. In some cases, it appears that, for whatever reason, allocation of revenue to communities has been deliberately held up (viz. the more than US$ 516,000 that remained unallocated in 1999).

One of the major successes of CAMPFIRE is the sense of awareness of the sustainable use of wildlife and the benefits that wildlife can generate that has been created in the minds of local communities. Wildlife poaching and destructive ‘mining’ practices have diminished significantly in CAMPFIRE areas. New opportunities for utilisation are becoming apparent to local entrepreneurs and communities. Tourism is seen as an important addition to economic activity, increasing the earning potential for all families. But, perhaps most importantly, CAMPFIRE has created the foundation for the progression to the next phase of sustainable and responsible tourism development within Zimbabwe.

Advantages can also be seen for other countries wishing to follow the example of CAMPFIRE. The model has been designed and the pitfalls identified. As part of an integrated tourism development strategy aimed at the alleviation of poverty and community empowerment, the CAMPFIRE concept is worthy of examination by other countries. Certainly, CAMPFIRE’s effectiveness in addressing these key development issues lies in its inherent ability to devolve control and responsibility of natural resources to those intended to benefit from the sustainable management of those resources. In this respect, however, CAMPFIRE has not been as successful as it could have been. This has been due mainly to reluctance within government to relinquish control of the programme at district level.

3.15.5 PRINCIPAL NRBCT MARKETING ISSUES NOTED

[MORE]

3.16 Summary of NRBCT operations and products in the SADC Region

[Tabular summary awaiting finalisation of other sections]

3.17 The *Directory of NRBCT Operations in the SADC Region* and accompanying database

One of the principal deliverables of this study is a directory of those NRBCT operations that are currently running in the SADC region. The *Directory* is primarily intended to inform the travel trade around the world of NRBCT operations and products in the SADC region that can be included into travel itineraries and tourism product portfolios. Accompanying the Directory as a deliverable is an associated database on NRBCT operations and initiatives.

3.17.1 NRBCT DIRECTORY

The *Directory* has been produced as an A5-size, full-colour, commercially printed publication that contains brief descriptions of the ___ NRBCT operations identified during this study. The operations are grouped into country sections, with descriptions of each operation taking up a full A5-size page. The following information is provided for each operation.

- Name of operation
- Location of operation
- Nearest town with commercial air access
- Description of natural resources
- Tourist products available
- Nearest protected areas
- Community institution involved in commercial operations
- Benefits accruing to communities
- Contact details of operator

At the end of each country section, a list of NRBCT initiatives encountered during the study is given. These are included to give the travel trade an indication of operations and products that are currently in development or are at the conceptual stage. It is hoped that by providing such information, assistance may be given to some of these initiatives by attracting the attention of potential sponsors, donors or private sector partners. As such, the *Directory* can serve as an important and useful investment marketing tool.

This first edition of the *Directory of NRBCT Operations in the SADC Region* is going out under the auspices of RETOSA. RETOSA, however, is due to be disbanded within the next year or so. This immediately brings into question who will be responsible for maintaining and updating the *Directory* and producing future editions.

It is the opinion of the team, however, that even if RETOSA was to continue operating indefinitely, it would probably be better for the *Directory* to be published on a country by country basis by the relevant state tourism bodies rather than by a regional body. There are two principal reasons for this. Firstly, it is felt that individual member countries would better support an NRBCT directory that focuses specifically on NRBCT operations and products in their own country, rather than one that provides information on operations and products in neighbouring and competing countries. Despite talk of regional cooperation in tourism marketing, there is clearly still going to be a large degree of self-interest marketing and strong competition for tourists amongst member countries.

Secondly, it would be easier for individual countries to update information on their own operations and products and produce new editions of the *Directory* for their countries, rather than having to rely on an external body to gather information from all countries and produce a regional directory. At the moment, RETOSA is that external body. With the body's planned demise within the next year, however, and with apparently no discussion on whether or not it will be replaced by another regional body, it seems safe to assume that there will be no regional body to take responsibility for the *Directory*. Rather, then, hand over responsibility for producing the *Directory*, or directories, to individual countries as soon as possible.

To keep some regional consistency and perspective on the Directory, however, it is suggested that individual countries keep much the same format for the Directory. This may help the travel trade in its efforts to incorporate NRBCT into regional tourism travel as a whole. Furthermore, if it were decided sometime in the future to produce a guide on NRBCT in southern Africa, perhaps along the line of a "Rough Guide", then the combined directories would provide a good information base upon which such a guide could be compiled.

3.17.2 NRBCT DATABASE

Accompanying the *Directory*, is a Microsoft Access database of NRBCT operations and initiatives in the SADC region. It was from information on this *Database* that the *Directory* itself was compiled.

To illustrate what type and detail of information is captured on the *Database*, an entry for an NRBCT operation in Lesotho is given below as an example.

Country:	Lesotho
Province/District:	Butha Buthe District
Product/Initiative:	Product
Community Enterprise Name:	**Liphofung Community Conservation Forum**
Physical Address:	Liphofung village
Contact Address:	c/o Earthplan Ltd, PO Box 333, Butha Buthe, 400, Lesotho
Telephone:	+266-460 723
Fax:	+266-460 723
E-mail Address:	Imminent

Website:	None
Description of Location:	Meaning 'place of the eland' located on small stream in spectacular mountain scenery. 28 km east of Butha Buthe on A1. 4.5 ha in size. Altitude 1,850 mamsl.
Description of Natural Resources:	Attractive sandstone overhang with Bushman paintings, archaeological deposits & of Basotho cultural & historical significance especially relating to Moshoeshoe I
Nearest Formal Protected Area:	Liphofung Cave Cultural Heritage Site itself, under jurisdiction of Lesotho Highlands Development Authority.
Nearest Town with Commercial Air Access:	Maseru, Moshoeshoe I International Airport
Tourist Products Available:	Traditional overnight huts for 8 guests, craft shop, museum, dancing, singing, traditional food, trails on Site, interpreted Bushman paintings, hiking, horse trails
Community Institution for Commercial Operations:	Community Conservation Forum, 6 committee members. A 6-person Exco will be formed once government management body has been established.
Future Development Plans:	Possible campsite nearby, archaeological display.
Operator Name:	Earthplan (Lesotho) Ltd
Postal Address:	PO Box 333, Butha Buthe, 400, Lesotho, or PO Box 83, Fouriesburg, 9725, South Africa.
Telephone:	+266-460 723
Fax:	+266-460 723
E-mail Address:	mail@earthplan.com (new address imminent)
Website:	www.lhda.org.ls
Benefits to Community:	9 fulltime local employees, including 2 guides. 10% of income generated goes to CCF, rest retained by LHDA. CCF decides how money is spent, but only on community projects. 90% of income from curios sold goes to individual crafts persons, rest retained by LHDA. All building done by locals.
Natural Resource Management Arrangements:	Site is presently administered & managed by Earthplan Ltd on behalf of Lesotho Highlands Development Authority. Intended that future management of site to be passed on to appropriate Lesotho Government body, which has still to be formed.
Maps and Photographs:	Photographs available from Earthplan (Lesotho) Ltd.
Notes:	Claimed to be only the second protected area in the world to be developed entirely by the private sector and to be handed over to a state conservation body. This form of 'build, operate, transfer' protected area is certainly unique in SADC. Apparently, the first such protected area was developed in Ceylon in the 1930s by a tea company on behalf of that country's then British colonial government.

As with the *Directory*, a listing of NRBCT initiatives is also included in the *Database*. It is expected that these entries would be updated as initiatives advance beyond the initial stages and become NRBCT operations in their own right.

It is also envisaged that the NRBCT Database would be country specific and reside with individual SADC member countries, rather than be lodged with some central body. This would make access to the database and updating information in the database much easier and more practical. Again, by keeping a similar format across the board, the exchange of information, if required, could be achieved fairly easily.

The NRBCT Database could also provide a useful starting point for tourism authorities in each country to begin categorising NRBCT operations and initiatives for the purposes of registration and licensing. This would assist in bringing NRBCT into the fold of other forms of tourism in each country.